



Ohio State University Extension
Redefining our Mission in the 21st Century
Progress Report – Internal Document for OSUE Employees

Our mission is to deliver educational programming for the public good and private benefit and encourage its implementation. If we are to accomplish our mission, we cannot remain the same. However, we must maintain our commitment to the people, communities, and businesses in Ohio and maintain our core values and competencies, but implement them in a 21st century world. Our staffing must be more flexible to better utilize and celebrate their talents and our program approach more entrepreneurial. We honor, recognize, and will maintain our connection to OARDC and with the departments within our own college as well as the colleges who have been our land-grant partners. We must continue to reach out and expand our partnerships across the University to boost our outreach and engagement efforts. We must expand the funding base by identifying and securing alternative funding sources. And finally, we must become more diverse in the process of these changes.

Key concepts: Programming charts our course. People make us successful. Funding cuts provide obstacles, but entrepreneurship will come to undergird our growth efforts.

NEW EXTENSION MISSION AND VISION STATEMENT

Engaging people to strengthen their lives and communities through research-based educational programming.

OSU Extension is a dynamic educational entity that partners with individuals, families, communities, business and industry, and organizations to strengthen the lives of Ohioans. As Extension educators, we:

- Focus on critical economic, environmental, leadership, and youth and family issues.
- Engage people in lifelong learning.
- Apply knowledge and practical research to the diverse needs and interests of Ohioans in rural, suburban and urban communities.
- Extend resources of The Ohio State University.
- Recruit and develop volunteers to multiply Extension's efforts while developing their leadership potential.
- Enhance teamwork through networking and connectedness.
- Link youth, family and community needs to scholars in Ohio and nationwide.
- Teach with cutting-edge strategies using new technologies and approaches.

In Extension we value:

- Excellence in educational programming.
- Grassroots programs that engage local people in solving problems and addressing challenges.
- Unbiased researched based information.
- Practical education that helps people help themselves.
- Timely responses to clientele concerns.
- Credibility with clientele and funders.
- Honesty and integrity in our work.
- Teamwork within offices, with clientele and with our educational partners.
- Flexibility/adaptability in local programming.
- Programming without discrimination and employment of people representing the diverse population of Ohio.

A DIFFERENT OPERATING MODEL FOR EXTENSION AS WE ENTERED 2003 AND MORE CHANGES IN 2004.

Plans for the future are a blend of doing what is right and survival strategies. Some organizational changes help us become better at what we do. Others are what can be termed *survival strategies*. These survival strategies may not have been our first choice in good times, but circumstances in 2003 and 2004 led us to decide on a new course of action which will enable us to cut costs, increase income and position the organization for the future. We ask for your support just as we requested and used your input through zoomerang, fireside chats, town meetings, the Director's Internal Advisory Committee, Farm Bureau Executive Committee, County Commissioners' Executive Committee, other stakeholder groups, Vice President's Cabinet, Department Chairs and personal conversations.

Philosophical Agreements for Program:

- **Increase entrepreneurial thinking while considering the Extension mission**
- **Program Areas broaden our clientele-base**
- **Provide more integration/holistic approach**
- **Interdisciplinary planning and implementation of programs**
- **Reach out across the campus**
- **Create the ability to be more flexible**
- **Become more relevant to Ohio citizens**

1. Program Priority Setting and Program Development

Extension core programming areas of: Family and Consumer Science, 4-H Youth Development, Agriculture and Natural Resources and Community Development continue, but a holistic programming approach has been determined.

- Expect to see planning and programming being conducted across all program areas using a holistic approach. Multidisciplinary, multi-department and interdisciplinary become a way of doing business. This already is occurring in some instances and we applaud the efforts of those individuals and teams. See Attachment A for a summary.
- Four to six initiatives will be identified for intensive efforts. These will be described in terms that make marketing and reporting impacts to funders more clearly understood. Initiatives will change periodically to reflect high priority needs of Ohio Citizens. Preliminary areas being considered:
 1. Strengthening/Enhancing Communities and Neighborhoods
 2. Enhancing Ohio's Educational Capacity
 3. Growing with Ohio's Green Industry and Agriculture
 4. Maintaining and Enhancing Ohio's Water Quality and Air Quality Natural Environment
 5. Creating Jobs for Ohioans – entrepreneurial and value added
 6. Food and Health
- Watch traditional programs grow in new directions as partnerships are formed across the campus.
- Nominate low impact programs for phase out at the same time as new niches in education for Ohio citizens are identified.

2. Program Implementation

- Specialization of county Extension agents will continue and will increase.
- We will also expect each person to contribute to broad Extension programming identified by the current initiatives that stretch beyond “what I’ve always done in the past.” 10% of county agents’ time will be dedicated to broad statewide issues.
- Funds were sought from the President’s Office for one-time seed money for Outreach. (Not successful.)
- We encourage closer networking and scholarly endeavors between county, district and campus faculty.
- We will build multi-state relationships to assist in curriculum design, evaluation and technical expertise. A partnership with Ohio State University, Purdue University and Michigan State University was established in 2004.

3. Fiscal Resources and Funding Base

Clarify our mission related to delivering educational programming for the public good and private benefit and implement it. Develop an implementation plan to recover costs and to generate revenue from Extension programs and materials.

- The Cost Recovery Task Force has developed a process and procedure. See Attachment C.
- Revenue generation resulting in \$2 million increased income centrally with accompanying gains to counties and units. (Goal: plan in place by June 2003 for start of implementation July 1, 2003.)
- Revenue will be used to initiate new programs to fund innovative grants and initiatives.
- Incentives for faculty and staff will also be created. Venture funds program is under development.
- Publications Committee and Technology Task Force are moving towards implementation of recommendations.
- The Business Office reprioritized to provide an increased level of support and guidance for fund development efforts.
- Funding will be redistributed to support increased program development and evaluation support on a regional basis to emphasize grant development opportunities and accountability.

4. Accountability

We must hold ourselves and our partners more accountable for what we deliver and for the measurement and celebration of outcome/impacts. We will reward innovation and performance of individuals, units and teams, not maintenance of the status quo.

- We will reward and expand funding opportunities to those who are productive. With limited resources, this may mean diminishing resources to those who are not productive or who chose to work in low priority areas.
- Extension funded positions should deliver Extension outcomes proportionate to funding.
- We will explore the concept of contracting with units, individuals and departments for programming outcomes we want to see realized. To do this we need to become more adept at defining needs and expectations. (See Appendix D for details of the program adopted.)

FORM FOLLOWS FUNCTION - Once programming direction and priorities were agreed upon, discussion turned to structures (people, facilities, administration) that would support program development, delivery and accountability. Additional cuts in the spring of 2004 necessitated implementation of new approaches.

1. Flexibility in staffing will emerge.

We cannot always predict the future, but we must increase our flexibility in how we fund and staff counties, centers, campus departments, and campus and regional administrative units.

- Counties will continue to provide programming in the four base program areas, finding niches within each program area. Lack of State match-dollars will require

some counties to curtail one or more of the base programs and focus efforts on Initiatives approached as interdisciplinary efforts.

- For county units, broaden the career path opportunities for non-agent program staff following the approach used with campus EA's to include: program specialists, program managers, program coordinators, and program directors.
- On campus, in centers and counties, increase the use of individuals hired on special funds for special projects offering only a limited term appointment. Look for ways to express value for the contributions these people bring during their time working for Extension.
- Change organization perspective on the role(s) of state specialists. Maintain faculty positions, but expand to include selected senior A&P professionals using the program director category for increased responsibility parallel to faculty. Value and reward contributions of A&P specialists.
- As hiring occurs, consider some positions which have been campus based (specialists and EA's) located and working regionally from Extension Centers.
- Effective July 1, 2004, current district offices will be closed or changed to Extension Centers which will provide statewide and regional leadership for program areas and Initiatives. Separate Regional Administrative units will be formed, each having its own Regional Director, Operations. (See Item 3c for details.)

2. Administrative Assignments

- a. Administrative Cabinet (July 2004) will consist of: Director; Extension Chair and Associate Director, Operations; Associate Director, Programs; Human Resources Leader, Business Operations Leader; Center Directors, Directors of Regional Operations; and Head of Communications and Technology.
- b. Leadership responsibilities were added to the Associate Directors and Director positions in five function areas during the summer 2003 retreat:
 - Function 1: External Relationships – increasing efforts and productivity
 - Function 2: Internal (University) Relations – increasing efforts and productivity
 - Function 3: Resource Development
 - Function 4: Research/Analysis and Marketing
 - Function 5: Interdisciplinary Program Coordination
- c. The Associate Director, Programs will provide leadership and direction to: Leadership Center, Data Center, Program Development and Evaluation, Continuing Education, Grants, Urban, OSU Cares and Learning Centers and Interdisciplinary Program Coordination and Research/Analysis and Marketing. An existing cabinet position, Assistant Director Continuing Education has been replaced with this position. The Department Chair and Associate Director, Operations position will increase efforts and leadership provided to Internal (University) Relations and Resource Development. The Director will broaden efforts in the area of External Relations. This will provide consistency in programming mission and vision.

- d. In May of 2004, administrative assignments for Assistant Directors and District Directors were restructured. Leadership for each specific program area is assigned to a Center Director or Initiative Leader.
- e. A Human Resources Unit led by a human resources leader and comprised of members of the current Personnel Unit and Employee Development Network (EDN) was formed. Several vacant positions in EDN have not been filled recognizing a cost savings. The benefit: brings together all units that currently handle Human Resources issues under one leadership and reduces staff.
- f. Two teams: Personnel and Operations and Program Teams will provide input to administrative decision making. Membership on the teams will be:
 - **Personnel and Operations Team Members**
Department Chair and Associate Directors, Directors of Regional Operations, Leader of Human Resources, Leader of Business Operations, and Diversity Leader.
 - **Program Team Members**
Director and Associate Vice President, Associate Director Programs, Center Directors, Leader of OSU Cares, Legislative Liaison, Leader Program Development and Evaluation, Director of Communications and Technology, and Diversity Leader.
- g. Executive Committee will be: Program Team Chair; Personnel and Operations Team Chair; Associate Director, Programs; Chair of Extension; Director of Extension.

3. District Specialist, Centers and Regions

- a. Roles and responsibilities of district specialists funded by state and federal monies have changed. Expectations related to performance evaluation were removed (2003). In 2004, roles were further redefined to work on center initiatives. 4-H specialists housed at centers also play a management role for 4-H programs within a defined geographic region.
 - There are 14 center specialist positions located statewide. This count includes the 2 urban specialists. This represents a substantial decrease in the number of district specialist positions.
 - Center specialist positions report jointly to center director and a program leader. 4-H specialists will function as program leaders with identified areas of specialization, focusing more in a geographic district.
 - There may be additional “specialist-like” staff paid by outside funds, but having different titles. These are likely to be term assignments.
- b. Extension moved from 5 to 4 districts, effective July 1, 2003. Effective July 1, 2004 district offices will be closed or transitioned to Centers. The three centers will be located at Lima, Wooster and Piketon staffed by specialists in all four program

areas, a center director as well as specialized faculty and staff based on program needs and priorities. Two Columbus-based units were also identified: Nationwide and Ohio Farm Bureau 4-H Center and OSU Extension's site in the Downtown Outreach and Engagement Initiative.



- c. Three administrative units will be created. Each region is an administrative unit reporting to a Regional Director, Operations. The map identifies the new regions.
- A Center will be established on the Lima campus. Until space is available, current district office space in Findlay will be used. The West Regional Director will have office space there.
 - A Center will be located in Wooster at OARDC, the current North District site. The North Central Regional Director will have space there.
 - The South Centers at Piketon will continue. The South Centers office at Jackson was vacated, but will be retained by OSU Extension as a cost recovery unit.
 - East District at Caldwell will be vacated but retained by OSU as a cost recovery unit. For the immediate future, it will house the Regional Director for South East.
 - The Southwest District Office in Vandalia was closed in early FY 2004.
 - Specialist and other positions funded by designated dollars or special funds will likely continue during the changes.

- Technology (IT) support will be increased as funding is available or redeployed. Centers will, as funds are available, add staff to support the functions of technology, educational design, marketing and technical writing.
 - d. Program staff in counties or units deliver programming in the newly described regions. Some adjacent counties may want to reduce geographic barriers to program delivery and subject matter expertise by clustering. These units or clusters will be locally initiated, not administratively driven. The sustained number of county educator (formerly agent) positions is 270.
 - County chair(s) in each county will report to the regional director. The county chair will become the supervisor of all staff (including agents) in their office.
 - Performance evaluation system has been revised to assist county chairs in evaluating agents.
 - Support and training of county chairs is underway and will be on-going.
 - Current programming clusters can and will continue, even with the change in district boundaries.
 - Flexible Staffing Guidelines related to appointment/reclassification for administrative and professional staff categories has been developed. This reflects different job responsibility levels: Program Assistant, Program Coordinator, Program Manager or Specialist and Program Director (Senior A&P) for campus and county A&P positions. See Appendix E.

FUNDING INFLUENCES PROGRAM AND STRUCTURE – The question presented was straightforward: How do we design a structure with the assumption of about 3 million dollar cut to Extension funding? Current funding cuts have reduced funding by almost 3 million from the 2001 base. A 19.5% decrease. Finding answers and agreement was difficult. The list highlighted below grew over the course of months and detailed discussions of program, structure and funding for county, regional, campus and administrative units. We anticipate further discussions, but these were the points of agreement for administrative cabinet. We are sharing both those items where there was agreement and those items still under discussion.

(To be revised, updated)

1. On-going cost cutting measures – annual rate savings
 - HR units formation provides \$170,000
 - Move out of all Ackerman space \$72,768
 - West District office space Move out of contract
 - Reducing number of district specialists from 27.8 to 14 _____
 - Closed SW district office; vacate Jackson and East _____
 - Continue number of vacancies per region - \$1.5 million (this is not a new savings, but is maintaining what has been underway)
 - Retirements/Attritions/Terminations \$440,412
 - Increase county cost share \$140,000
 - First agent (effective January 1, 2004) goes from \$11,000-\$16,000 and all others have a cost share of \$32,500
 - Adjust cost share upwards each calendar year

- Savings from Centers TBD
 - Academic Department Cuts \$805,897
 - Units to become self supportive over a 3 year period-include: Leadership Center, Data Center, Enterprise Centers, Bee Lab, Plant Pest Diagnostic Clinic, Learning Centers
 - Future possibility of differential formula for funding departments
 - contracting for outcomes across campus
 - cut back funding to international
2. One time cost savings
 - Request one-time seed money for Outreach from President's Office \$675,000
 3. Incentive package offered June 2004 – September 2004 to encourage retirement of those already eligible to retire.
 4. Sustainable staffing with maximum of 270 county cost shared agent positions is a target number. This anticipates a similar cost share arrangement as currently used with proportionate increase each fiscal year.
 5. Virtual office options will be initiated with some campus and center positions. Guidelines have been developed. (Guidelines being updated.)

INNOVATION WORK GROUP RECOMMENDATIONS

A work group representing all program related areas and positions met for discussion and brainstorming on ways to change the organization, encouraging a more entrepreneurial spirit. Recommendations presented to the Administrative Cabinet have been incorporated into new directions for the organization. Approaches included:

- Create mechanism for obtaining new sources of funds (large grants and contracts).
- Professional staff to generate \$XX (create reward system).
- Identify new audiences proactively and seek funding (real \$ and in-kind).
- Attach a value (monetary) to everything we do.
- Develop staffing relationship with local, state, national, international (contract for services) entities.

SUMMARY COMMENTS

We cannot become what we need to become by remaining what we were. While we design our plan for the future, we continue to return to our mission and vision and re-affirm our commitment to the people, communities and businesses of Ohio while providing high quality, relevant and accountable educational programs.

ATTACHMENT A

HOLISTIC PROGRAMMING DIALOGUE

October Retreat, 2003 – Livingston House

Our mutual purpose is to make a commitment to do holistic programming and blend this approach with our current program development and delivery approaches.

- Within current program areas
- Engaging across two or more program areas
- Multi-state; multi-department
- Around issues

We recognize that *holistic* is a mind set and needs to become a part of all we do.

- Has aspects that are economic, social, environmental, productivity oriented
- It needs to be recognized and rewarded where it is occurring and encouraged where it has the potential to be effective
 - Celebrations, team awards, support from professional organizations; identification of county's or programs
- We want to be recognized as a holistic organization as we address issues, engage county clientele and integrate the resources of current specialists and university resources

We will re-organize the way we communicate with clientele

- 7 broad elements that people understand
- “We bring information and knowledge to the people of Ohio to apply to current issues and problems”
- We need to be known as efficient, effective & relevant
- Marketing takes on increased importance in this communication process

We will accept there will be multiple dimensions to what we do

- We must be *proactive* in identifying issues that the organization will address holistically and at the same time *reactive* to local requests that are within our mission.
- We must have depth and breadth in a holistic organization
 - Micro-issues may be addressed by a single department, program area or geographic region; broad issues will draw expertise and support from those having the knowledge.

We have put in place a structure to help facilitate holistic programming

- Associate Director, Program position will help guide
- 21st Century document and OSUE plans support

The WHY's behind holistic

- Builds on the LOGIC model we already have in place and the social action process
- Has grown out of our futuring plan and Zoomerang survey of all staff
- Clientele are “whole people” and their needs are multidimensional
 - Example: farmers have families, health issues, live in changing communities and ...

Where it will take us:

- Maximize our contributions to Ohio clientele
- More relevant
- Better solutions to issues and problems with all disciplines working together
- Viability to be funded
- Move across the university and beyond in developing partnerships
- Mission and vision implemented
- Broaden our urban focus
- Affirm the 21st Century report and directions

How Questions:

How do we do this and not jeopardize our relationship with current colleges?

Is who gets credit an issue?

How to involve professional organizations, _____, _____

How to respond to concerns about lack of time or lack of interest?

How to protect time during cabinet for discussions on holistic

How often to do environmental scanning and identify proactive holistic programs; what will they be?

How do we prepare our people to work together as county teams, interdisciplinary team, or in other partnerships?

How do we implement? Where do issues go?

How do we help our people understand holistic programming

How do we encourage risk taking?

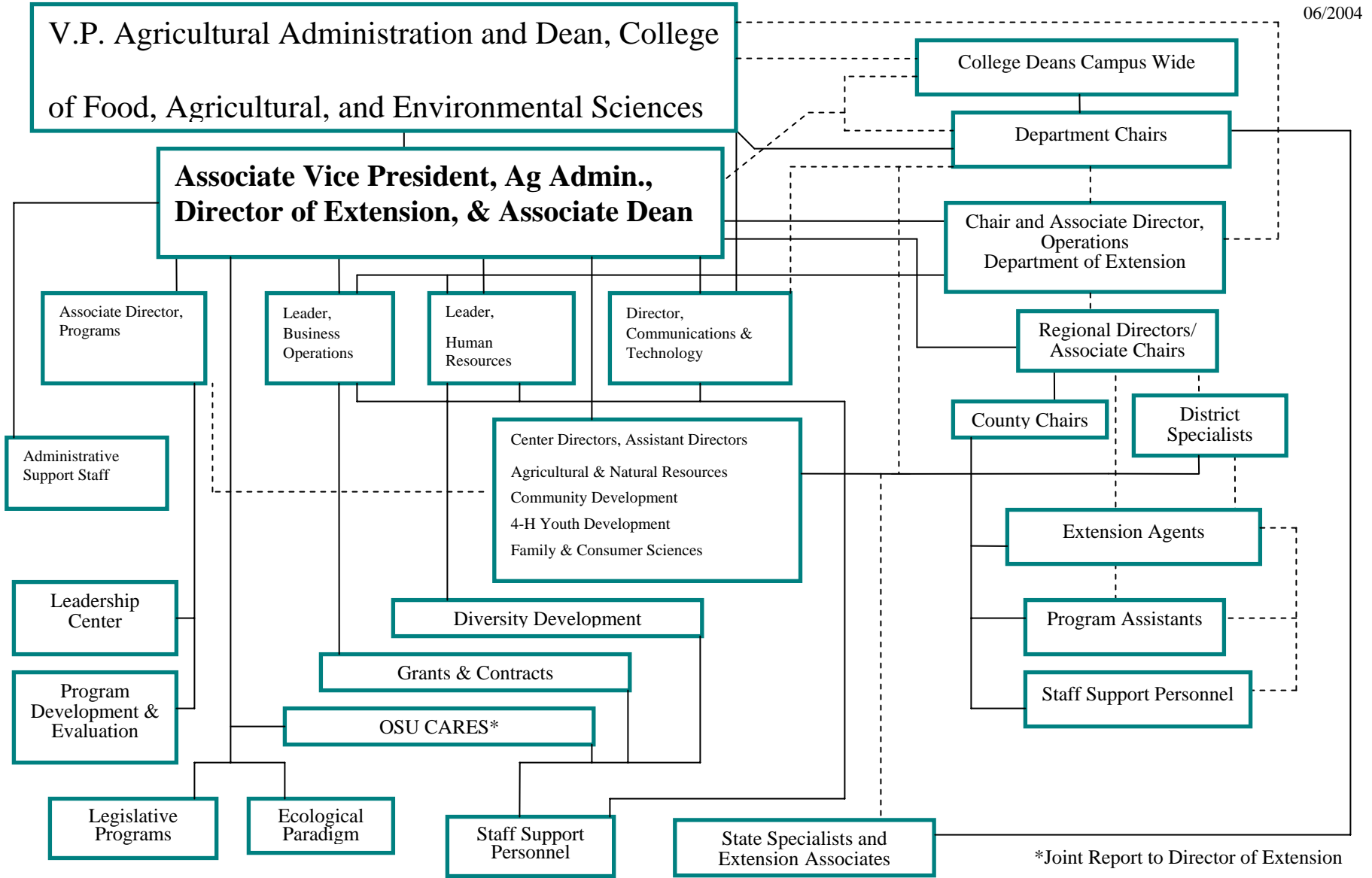
Administrative Cabinet Goals

- + Build shared experiences
- + How people think and process
- + Increase ability to communicate within group
- + Know one another better
- + Push conversations beyond uncomfortable zone for agreement
- + How to push ourselves to make decisions quicker
- + Move efficient and effective in group settings
- + Clear and consistent message from group after decisions

Administrative Cabinet Ground Rules

- + Disagree with idea, not person
- + Candor
- + Manage one another's reputation
- + Listen with open mind
- + Decisions are ultimately for the betterment for the org.
- + Regardless of decision, we all support it
- + Consensus decision making
- + Opportunity for all to share their ideas and thoughts
- + Hold confidences
- + Commit ourselves to the day and meeting
- + Capture decisions and the why behind it
- + Humor is important

Extension Organizational Structure



ATTACHMENT C

<http://www.ag.ohio-state.edu/cost/index.html>

DRAFT

ATTACHMENT D

Clarifying Expectations and Funding of the Academic Base for OSU Extension Programming

The mission of OSU Extension is to deliver educational programming for the public good and private benefit and encourage its implementation. If we are to accomplish our mission, we cannot remain the same. However, we must maintain our commitment to the people, communities, and businesses in Ohio and maintain our core values and competencies, but implement them in a 21st century world. Our staffing must be more flexible to better utilize and celebrate their talents and our program approach more entrepreneurial.

We honor, recognize, and will maintain our connection to OARDC and with the departments within the College of Food, Agricultural and Environmental Sciences as well as other colleges who have been our land-grant partners. We must continue to reach out and expand our partnerships across the University to boost our outreach and engagement efforts. We must expand the funding base by identifying and securing alternative funding sources. And finally, we must become more diverse in the process of these changes. Programming charts our course. People make us successful. Funding cuts provide obstacles, but entrepreneurship will come to under-gird our growth efforts.

The Role of the Academic Base in Extension Programming

To deliver educational programming for the public good and private benefit of Ohioans, OSU Extension needs strong relationships with academic departments throughout Ohio State University. The process is designed to ensure that Extension Administrators, Department Chairs and faculty/staff with OSU Extension appointments share common expectations and outcomes in support of Extension programs. This document outlines specific criteria that will form the basis of negotiated annual funding agreements with academic departments supporting OSU Extension programs:

1. An overall philosophy for Extension programming,
2. A new model for funding the academic expertise needed for Extension based upon mutually agreed upon outcomes,
3. A process to annually establish priority, review expectations and recognize outcomes.

We believe that this model will provide support and recognition to academic units based upon performance as well as enable Extension to provide funding to stimulate innovative new initiatives.

Agreements That Guide OSU Extension Programming

As OSU Extension has sought input internally and externally to chart our future course, several key concepts have emerged and were adopted by Administrative Cabinet to guide programming:

- Increase entrepreneurial thinking while considering the Extension mission
- Program areas to broaden our clientele-base
- Provide more integration/holistic approach

Agreements that guide programming (continued)

- Interdisciplinary planning and implementation of programs
- Reach out across the campus
- Create the ability to be more flexible
- Become more relevant to Ohio citizens

A 21st Century Funding Model for the Academic Base

A differential funding model will be initiated that provides base funding for faculty/staff in academic departments. Over a three year period, a new model will be instituted for allocating operational funds based upon mutually agreeable expectations, planned outcomes and performance. Funds once allocated based upon FTE will be allocated using a proposal process. Characteristics of the model include:

- a. Departments will submit proposals for funding to support priority initiatives.
- b. Extension funds will enable departmental faculty and staff to leverage dollars using a variety of cost recovery strategies that will remain in the academic unit's budget for reinvestment in programs. There will be no expectation of sharing a percentage of cost recovery dollars with central Extension Administration.
- c. Since Extension funding for faculty and staff provides leverage for departments to obtain grants and contracts, sharing of release time for faculty/staff with joint appointments will be determined prior to the submission of proposals. This will be decided mutually by the faculty/staff member, Department Chair(s) and appropriate Extension Assistant Director(s).
- d. Extension and the College will hold centrally all faculty and staff vacancies that occur through either attrition or retirement. Positions will be allocated based upon current Extension program priorities and initiatives.

- e. By year three in the plan, the academic department will receive a pool of funding for faculty/staff salary and benefits rather than an allocation for specific FTE appointments on individuals. This will enable the Department Chair to use funding in a flexible manner to reach the agreed upon expectations for OSU Extension programming.
- f. The budgetary process may result in differential allocations of funds to departments based upon the expectations, plans and documented outcomes from prior years.

How will funding be re-directed for this new strategy?

A three year phase in process has been developed to gradually redirect funding from an FTE based approach to one based upon expectations and outcomes.

Phase 1: FY05:

- Departmental funding will be reduced 6%.
- Departments will keep 100% of their Extension carryover.
- Departments will continue to receive funding for specific tenure track faculty based upon FTE.
- Extension will hold back 50% of annual rate operating funds to be re-allocated to support Extension program priorities in academic departments using a proposal process.

Phase 2: FY06:

- Extension will hold back an additional 25% of annual rate operating funds.
- Departments will be funded a lump sum support based upon the FTE tenure track faculty currently in the department.
- Academic Departments will retain any Extension carryover.

Phase 3: FY07:

- Fully implement contract basis for departmental funding.
- Departments will be funded totally on productivity related to Extension program priorities and have no guarantee of annual operating funds from Extension.

What are OSU Extension Expectations of Academic Departments?

To ensure that OSU Extension meets its mission and is accountable to multiple funding sources, there are expectations for academic units receiving Extension funding. They are outlined below. Expectations may differ based upon the nature of the academic discipline, programmatic needs and level of funding. Departments will propose baseline numbers for 2004: **(priority criteria are bolded)**

1. Conduct a defined research program that contributes to Extension program initiatives.

For each Extension FTE, the department will generate:

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Revision date: 1/13/2006

- **XXX interdisciplinary proposals that engage Extension field faculty in applied research**
- **XXX Scholarly publications and user publications related to Extension, Outreach and Engagement (pre-agreed upon number and topics). This could include revision of publications and/or fact sheets.**
- xxx market assessments, needs or capacity assessments of targeted user groups or evaluation/impact studies of current Extension, Outreach and Engagement efforts.
- xxx professional development opportunities for Extension personnel in area of expertise
- xxx meetings/programs for clientele in the area of expertise based upon basic and applied research programs

2. *Provide innovative leadership for priority program initiatives in collaboration with Extension faculty/staff as well as faculty/staff from units across campus. This includes active discussion and provides support for the development and implementation of 4-H curriculum and learning experiences relevant to the academic discipline.*

For each Extension FTE, the department will develop/generate:

- **XXX dollars generated in revenue from grants, contracts, user fees, gifts and/or endowments to support program delivery**
- xxx programs reaching new, underserved and minority populations
- xxx faculty exploring and establishing multi-state programs
- xxx revised educational materials (fact sheets, publications, multi-media products, etc.) in support of Extension programs
- **Annually publish by (XXX date) a list of departmental specialties and faculty available to: resource county programs, serve as consultants to agents, and to develop collaborative research and outreach efforts. This would include faculty assigned to work with specific 4-H educational projects and curriculum design.**
- National/international distribution of materials, participation in meetings/ conferences and use of those outside Ohio. (faculty)

3. *Collaborate in interdisciplinary outreach initiatives and bring university-wide resources to bear upon issues*

For each Extension FTE, the department will develop/generate:

- **XXX major initiatives and define potential scope of outreach and engagement efforts for the coming year**
- xxx faculty members will serve on interdisciplinary teams with an identified Extension/Outreach and Engagement mission

Process to establish expectations and review outcomes:

The College of Food, Agricultural, and Environmental Sciences recently completed a 6 year academic plan. Departments addressed their priorities for supporting Extension and university outreach programs in those plans. OSU Extension also engages all county and district units in planning to identify statewide priority needs with the involvement of community stakeholders. The following process will build on the current planning processes to link academic unit plans with priority issues and needs Extension identifies statewide. Each step of the process is designed to clarify expectations and to track progress, outcomes and impacts related to priority programs. All academic departments or units with fiscal support from OSU Extension to support programming will be expected to engage in this process. The timeline and focus of each step of the process is outlined below:

Late Fall/Early Winter:

Extension program priorities for the next fiscal year are identified through dialogue and input from counties, districts, academic departments, OSU CARES, Urban programs, Learning Centers, and Leadership Center and communicated throughout Extension and to colleges across campus.

Late Winter/Early Spring:

A meeting will be held involving Extension administrators, department chairs, and departmental faculty to confirm the Extension program priorities to be addressed involving the expertise of the department. The group will discuss local program needs and emerging trends from research and establish expectations for the coming fiscal year. People to be involved in this meeting will include:

- Extension Director and/or Associate Director, Programs
- Assistant Director(s) for related program areas (i.e. 4-H Youth Development will be involved in departments with linkage to curriculum needs)
- Department Chair
- Faculty with Extension appointments
- Extension Associates

Late May/Early June- Budget Hearings

The Academic Department submits a plan for addressing mutually agreed upon expectations as well as an operational budget proposal.

July 1: Departments are notified of funding they will receive.

July-October

Assistant Directors meet with specialists and Extension Associates concerning implementation plans and progress toward expectations.

October-December

A second meeting (including the same administrators, faculty and staff) will occur to review:

- departmental progress toward agreed upon expectations

- what remains to be accomplished and timelines to do so
- program impacts

December/January

- Department submits College annual report that includes Extension activities.
- Faculty/staff with Extension appointments submit Unified Reporting System reports.

Emerging funding strategies to support programmatic expectations

Funding will be redistributed among departments campus wide to support critical program priorities to address the needs of Ohioans. Some additional differential funding strategies will include, but not be limited to the following:

- a. Alternative staffing strategies to enable flexibility to support rapidly changing, critical issues:
 - Increased use of limited term appointments
 - Change organizational perspective on state specialists to include selected Senior A&P professionals using the “program director” category for increased responsibility parallel to faculty.
 - Value and reward contributions of A&P specialists
 - Locate regionally some specialist and A&P positions which have traditionally been campus based.
 - Review specialist and A&P positions funded by designated dollars regularly to determine need for continuation.
- b. Phase out of some specialist and EA support based upon changing programmatic needs.
- c. Competitive Venture Funds to support for new program niches with potential for cost recovery
- d. Funding for collaborative scholarly endeavors among county, district and campus faculty focused on applied research and Extension programming

ATTACHMENT E
Flexible Staffing Guidelines

ATTACHMENT F

Ohio State University Extension
Virtual Offices – Work Places
Proposal – April 7, 2004/Updated June 2004

The committee believes that the Extension professional is needed as close as possible to clientele and/or other team members, which does not always require housing in a single office. The professional does need connection to a strong problem-solving team, clerical support, and housing for website management, computer technical support, etc. Effectiveness and efficiency will be lost without this connectivity to support rules.

Criteria for Positions/People Suitable for Virtual Offices

1. Many job roles can be conducted via electronic media and at multiple sites.
2. Individual is capable of working independently; self-starter; good time manager, trustworthy.
3. Understands, uses, and adapts new information technology.
4. A willing communicator and effective in multiple communication modes; responsive.
5. Embraces change.
6. Availability at home for office space.
7. An agreed upon arrangement that will enhance efficiency and effectiveness of the professional and program delivery.

Process

1. OSU Extension program and budget-driven.
2. Professional and supervisor must mutually agree, with an option for either to refuse.
3. Employee must be Columbus-campus, district/center-based, or on special assignment.
4. Position will be identified and approved by a review of: immediate supervisor, HR representative, and Department Chair.
5. Virtual office plan must be specifically developed, including a budget and evaluation plan for each employee with their supervisor.
6. The virtual office agreement can be terminated by the employer at any time, or through mutual agreement by supervisor and employee.
7. The virtual office agreement should be reviewed annually.

Support*

1. Cell phones, with voice mail, published as employee's phone number.
2. Computer support will be provided through phone, help desk, or a specified work site.
3. Support staff, supplies, and equipment (computer, copying, scanner, etc.) needs will be negotiated.
4. Mileage reimbursement will be established following University guidelines.
5. Support for phone/fax installation will be provided.
6. The person's supervisor must have a high level of trust for the employee; cannot be a micro-manager; is capable of communicating electronically.
7. Professional development opportunities must be provide to prepare/assist the virtual office worker.

Questions

1. Can contracting be conducted with local Extension offices to provide clerical and equipment support?

Probably not. The base office should be providing this support.

2. Can a home office be utilized as a tax deduction?

The individual would need to talk with their own tax consultant related to this situation.

3. Could home office address be used for main address or the identified local office?

No. The base office needs to be utilized as the mailing address and base of operations.

*Clarification on support to be provided.

1. A base office location will be identified. This will be the mailing address and phone will be forwarded if possible.
2. Cell phone with voice mail provided following current University guidelines.
3. Current computer or laptop would be provided. A laptop is optimum and would eventually replace a desk computer if this is all that is available at the start of the arrangement.
4. A phone/fax/printer combination would be provided or funding to purchase this equipment.
5. A maximum of \$50.00 per month will be budgeted to cover telephone bills, line charges for a second line, or internet connectivity. The individual will discuss with his/her immediate supervisor the most reasonable combination. The monthly costs will be reimbursable to the employee having paid the bills. It should be noted that this will be viewed as a taxable benefit.
6. For estimating purposes, it is estimated that a \$1,000 will be budgeted per year to support the virtual office arrangement; this does include the phone-internet access. Reimbursement will follow current University guidelines.
7. The current University policies related to mileage will need to be followed. At this point, the details are unknown.

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POP Team reviewed.