

PERSONNEL AND
ORGANIZATIONAL
DEVELOPMENT
COMMITTEE

Planning Session
September 20, 1995
Vail, Colorado

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Overview

The Personnel and Organizational Development Committee (PODC) conducted a planning and futuring session as a part of their fall 1995 committee meeting September **19-7?**, 1995 in Vail, Colorado.

The five phases of the futuring and planning session reflected the group's objectives:

- to review the current state of Extension and the emerging discussion of chaordic¹ organizations;
- to develop a 2 year "Victory Vision" for PODC and identify the reality associated with the vision;
- to identify the commitment of the PODC committee as related to their vision;
- to identify the issues faced by CES as related to PODC; and,
- to develop potential action strategies for PODC in the next two years.

PHASE 1

Reflection on the "State of Extension" and Chaordic Organization

The group began with a brief reflection on the prior day's discussion on the state of Extension and chaordic organizations. The group agreed that this is a time of unprecedented opportunity for organizational growth and development. Also, it was clear that if ECOP chooses to continue to explore the development as a chaordic organization, PODC will be in a unique position to further these efforts. Additionally, the group identified the following learnings from the previous day's discussion to "keep in mind".

Things for PODC to "Keep in Mind"

- We all have the same goal, but may go at it in different ways.
- Keep purpose and principles in mind, especially empowerment; give everyone opportunity to participate.
- We will have to change in order to survive.
- We can bring all along - no need to leave some behind.
- Challenge yet opportunity for PODC to be in front! RESPONSIBILITY!

¹ CHAORDIC is a term coined by Dee Hock, founder and Chairman emeritus of VISA, to describe an organization living and working on the edge or balance point between chaos and order.

PHASE 2
Victory Vision and Current Reality

After reflecting on the agreed upon principles and purpose of Extension and role of PODC, the group then described that the outcomes would be in two years based on the committee's view of "Victory". This step established the committee's two year victory vision. (see "Victory" circle on page 4). The group then considered the current situation in CES, in light of their victory and the outcomes they are seeking to achieve. The group defined the following as part of the current reality:

- Strengths:** What strengths do we have to achieve our two year victory?
Weaknesses: What weaknesses do we need to consider in our plans for victory?
Benefits: What are the potential benefits of our victory?
Dangers: What might be potential dangers of achieving our victory?

Responses to these questions are presented in Table 1 on pages 5 and 6.

PHASE 3
The PODC Commitment

The group identified the commitment of the PODC as follows:

- Environmental scanning mechanism - both internal and external.
- To guide change
- Challenge the process and assumptions
- Resource to others
- Encourage networks among folks - an enabling role
- Suggest changes to others
- Committed that CES should have a future
- Initiate projects that facilitate change
- Recommend concrete action
- Input to ECOP and expect our accountability for action (the point value on what we say we will do)
- Collecting information and analysis as needed
- Work as a team - better integrate outreach into Land-Grant Universities
- Share innovative ideas and success
- Representative views of constituents - think tank
- Maintain understanding of where we are - know system
- Be accountable
- Provide leadership
- Commitment

PHASE 4
Issues/Challenges

The group moved on to identify the issues and challenges which Extension is facing. These are listed in Table 2 on page 7.

PHASE 5
Action Strategies

The group continued by identifying the key actions the PODC could take to address the issues and challenges. Outcomes from this discussion were used by the group to develop possible strategies, by identifying the intent of the strategy, possible action steps, time line for actions, and possible outcomes. These are summarized as potential action strategies on pages 8 through 12.

PHASE 6
Future Work

The next day, the group continued by identifying areas for future work. Outcomes from those discussions are listed under Areas Identified for Future Work on page 12.

VICTORY! VICTORY!

- We would be here!
- Structural change would be driven by purpose
- We've continuously reconfirmed the CES niche & it's been reconfirmed with customers
- Broader sense of diversity beyond race/gender
- Field faculty feel the organization is flat and they are empowered
- Simplification of complexities, not just jump hoops
- Unified purpose-all know what we are here for
- PODC would represent Education, Research & Extension
- Others understand what we do for them
- More pride, less "beating up on ourselves"
- Feel good about working smarter, not harder
- We worked ourselves (PODC) out of a job!
- Bringing "old and new" together-sense of oneness
- Opportunity for learning of charodic spread to lower level of organization
- We'd welcome, embrace, & anticipate change
- We were successful in influencing selection of indicators (eval.) so they reflect our educational purpose
- Specialists and county staff understand how technology eases their load
- Clarify expectations re: agents & specialists
- CES makes leap to technology era!-Everyone uses it
- "Administrivia" & reports eliminated
- \$ doubles at all levels-or maybe not, yet change occurs
- Emphasis on access; Customer driven
- Creative budgets & other funding
- We trust each other to commit to common purpose (hence less reports)
- Outreach would be highly regarded by Land-Grant Universities
- Outreach is #1 priority for Land-Grant Universities
- Respect and appreciation re: financial supports-others recognize what we have to offer

Table 1-A

CURRENT REALITY	
Strengths	Weakness
<ul style="list-style-type: none"> • Expectations for individual staff • Institutionalized in-service training • Have lots of flexibility • Progress strong • <u>People!</u> • Nationwide network • Lots of new Directors • Lots of people with commitment • Partnership-Federal/State/Local • Partnership with other groups/agencies • PODC • We have a tradition • Grass-roots structure • Allow for differences • Research-based • Some states able to take lead • Integrated teaching, research, public service • Land-Grant University system • Field staff • Sizeable resources • Tenacious and independent volunteers • Programming across life cycle • Listen to what people say they want • Interdisciplinary perspective • Organization structured for ways to meet changing needs • Positive thinkers • Trained staff, really committed • “They truly care” 	<ul style="list-style-type: none"> • Status with hierarchy • Unable to move from defense to offensive • Not quick enough to address challenges • Unwillingness to let go • Failure to anticipate new partners • Network of partners makes us unyielding • “Administrivia” takes time • Recognition • Fear of unknown • Too many policies/regulations, not enough guidelines • Failure to realize public organization downsized • Not willing to try creative staffing • We stress ‘how’ not ‘what’ we do • Staff feel over-worked • Location of CSREES in Agriculture • Lack of measured impact • Things we do are service not education • Locked into office of past-not future • Hung up on uniformity • Perception that we have no focus • Slow to make decisions • Emphasis on academic training instead of communication skills • Marketing is weak • Inadequate resources • Tradition of Ag. base-4-H tradition • Chasing \$ rather than the other way around • Reluctant to contract things out • Don’t walk the talk re: diversity • We feel that if we publish report we have done something • Clientele don’t think county faculty are knowledgeable • Need tools to help people work smarter • We “buy in” to allowing people to misperceive us, and don’t challenge assumptions enough • County & state boundaries

Table 1-B

CURRENT REALITY	
Benefits	Dangers
<ul style="list-style-type: none"> • New partners & funders • Higher levels of motivation • Pride • High morale • Sense of focus • Greater creativity • Less paperwork • Better programs • Less guilt for less work (we <u>can</u> work 40 hour weeks!) • Greater unity • Better education • Increased individual self esteem • Increased funding sources • We would have cheerleaders vs. supervisors • Educated environment • Enhanced communications across research and education • More creativity with programs • \$ chases us • More time to make a difference • Teamwork • Less stress • More fun! • Less downtime • Stronger staff to respond to diverse needs • Greater creativity for outreach from Land-Grant Universities • Cutting edge • More proactive • Opportunity for renewal of self/organization • Able to identify impacts • Organization would make difference in communities 	<ul style="list-style-type: none"> • Too complicated • Could alienate traditional groups, staff and clientele groups, academic community, and funding sources • Could become competitive • Lose some directors • Have to find new resources we never used before • Lose support base and purpose • Raised pride could lead to unwillingness to work with others • Might not be able to shift to new ways of thinking • could lose some of good things that brought us here • Become reluctant to change • Target of other competitors • Greater need to communicate • May not be able to afford changes

Table 2

PODC – WHAT ARE THE ISSUES WE FACE IN EXTENSION?						
Internalizing Purpose	Broadening Funding	Integrating the Land Grant Function	Human Resources for the Future	Customer Focus	Fostering Shared Leadership	Relevance and Impact
<hr/> Purpose <hr/> Develop vision/focus for Extension to make a difference in the 21 st century. <hr/> Outreach <hr/> Positioning the organization (internal)	<hr/> Diverse funding <hr/> Alternative funding sources <hr/> Limited funds <hr/> Broadening base of support	<hr/> Functioning as a university faculty <hr/> Seamless teaching, research, Extension <hr/> Strategies to integrate teaching research and outreach <hr/> Research/ education integration	<hr/> Selection, retention and support of diverse staff <hr/> Organization reflects current demographics <hr/> Develop creative staffing patterns based on purpose and principles <hr/> Human infrastructure to support technology <hr/> Balancing work and family <hr/> Working smarter	<hr/> Empowering clients to be change agents <hr/> Involvement of clientele <hr/> Ever-changing clientele and their needs <hr/> Strategies to work with those we alienate <hr/> Technology as a useful tool for program deliver <hr/> Organization reflects current demographics	<hr/> Decision-making <hr/> Effectively use divergent thinking <hr/> Trust between partners <hr/> Ethics and integrity <hr/> Complexity and communication <hr/> Interdependence of different interest groups <hr/> Diminish position power/classism	<hr/> Marketing Extension and programs <hr/> Accountability <hr/> Reporting system with flexibility <hr/> Indicators of educational impacts <hr/> Customer ID

ACTION PLANS IN STRATEGIC AREAS

(small group work)

A. ECOP to Demonstrate Shared Leadership and Re-evaluate Composition for the "New Organization"

Group Members: *Warner, Calvert, Gear, Gruber-Hagen*

Topics

1. Options for implementing ethical decision-making standards.
2. Support for self-managed teams.
3. Models of shared leadership.
4. Training re: key organizational issues.

PODC Will Take Responsibility to:

1. Design organizational process that brings cross-section of staff together to explore key issues facing CES.
2. Secure the needed legitimization.
3. Lead exploratory process that would be a dialogue in which participants speak to the issues from their unique perspective in the organization.
4. The process would model shared leadership, self-directed teams, and ethical decision-making as the learning experience.

Products:

1. Participant learning that they can use and apply
2. Their action proposals re: issue(s)
3. Results more broadly shared
4. Re-evaluation of ECOP composition and modeling of shared leadership would result from issue(s) dialogue (see above) within the System.

Action Steps:

PODC ECOP Administrative Advisors Jim Christenson and Harold Benson to bring the issue of ECOP reorganization to ECOP for discussion, debate and change!

B. Create National Funding Sources Directory - (External Sources)

Public Directories:

1. Federal agencies in addition to USDA
2. States agencies representation includes state government
3. Local agencies representation includes local government

Private Directories:

1. Foundations, Council on Foundations
2. Grants directories
3. 4-H Foundations
4. Non-profits (other)

C. Develop Position Paper on Formula Funding (Internal Sources, CES)

Action Steps:

1. Whole budget needs to be reviewed with respect to 1890 and 1862 issues, Native American Colleges, Territories.
2. Provide representation of CES to Congress by focusing on both traditional and nontraditional; e.g. urban issues, HIV/AIDS, "Decisions for Health".

Outcomes:

- Competition with each other in CES
- Another option for our support
- More flexible organization and less dependent on 3 levels of spending (present structure)
- Offer wider range of programs for broader outreach
- Broader funding base
- Broader human resource base
- New audience contact through special interest programs
- Joint projects with other states

D. Support Strategies for Center for Diversity

Action Steps:

Directory is one strategy.

E. Identify Successes for Broadening Funding

Action Steps:

Send out internet request.

F. Assess and Promote Outreach Impact

Action Steps:

1. PODC to initiate a workgroup to document and share University outreach successes and role of Extension (year 1).
2. PODC to develop a position paper to position Extension in emerging outreach models (year 2).

Outcomes:

1. Paper to be utilized by Extension Director with University president to focus discussion on emerging outreach models and how Extension can support and carry out the outreach function.
2. Must consider relationship with "new" emerging entities that have adopted outreach as part of their mission.

G. Develop Position Papers on:

1. Progress Made in achieving seamless approach to research, education, and Extension
2. The Value of county agents teaching credit courses (through distance education)
3. How to merge Extension and Research at all levels
4. Value of integrating county agents with departments and institutes

Group Members: *Pauline Nickel, Jim Christenson and Linda*

Action Steps/Focus of Position Papers:

1. Case studies/examples what's being done in different states on local level.
2. Positive models to stimulate local university outreach integrating research and education, special emphases on private sector inputs is knowledge, desire, resources, and feedback.

Pending Issue:

Recommend to ECOP that SCOP-RICOP organize joint workshop to deliver seamless delivery system in Land-Grant Universities.

H. Identify and Share Successful Actions which have Attracted, Retained and Supported Diverse Staff in the System

Action Steps:

Identify and share successful actions which have recruited, selected and retained diverse staff in the system (group working on by 11/96).

I. Identify Successful Policies and Practices which Foster Balancing Work and Family

Action Steps:

Identify successful programs, benefits and work arrangements which foster balancing work and family (1/96).

J. National Dialogue on Family Work Issues

Action Steps:

Share outcomes from action under Area H. (see above) at various meetings; e.g. Director/Admin., Admin Managers, ESP, etc.

K. Identify Successful Ways We Can "Work Smarter"

Action Steps:

Identify successful ways we can "work smarter" through email on HR Network. Organize and share input.

L. Develop Creative Staffing Models

Action Steps:

Email HR Network regarding successful use of human resources and staffing patterns. (Keep & share by 7/96)

M. Staff Profiles for 21st Century: Skills, Competencies, Attitudes

Action Steps:

Identify competencies, skills and attitudes needed by Extension professionals in the 21st century:

- HR manager led
- PODC validate
- Survey various groups
- Collate and share by 11/97

N. Design Mechanism to Deliver Useful In-Service Trainings to Recruit, Select, Retain Diverse Faculty/Staff

Action Steps:

TBA

O. Develop Position Paper in Extension Research and Technology

Action Steps/Focus of Position Paper:

1. Customer access strategies using technology
2. National CES orientation and technology materials for states
3. PODC/PLC to address human resource technology use, identify needs, and develop current strategy ("people-ware")
4. Make information available across boundaries. i.e. World Wide Web

Outcomes:

Recommendations and a paper, including orientation materials and options on access; focus on "people-ware" vs. hardware and software, to be shared at conference in 1996.

P. Encourage Continuous Environmental Scanning by Diverse Teams

Action Steps:

PODC to model through email on PODC issues: crossing boundaries; sharing leadership/involving others.

Q. Utilize Technology to Debate Tenure Issue

Action Steps:

Create moderated email forum to foster debate; budget funds for graduate student to moderate; synthesize outcomes in white paper for review.

Additional Potential Strategic Action Areas Identified but Needing Further Development Were:

- Strategies on evaluation and accountability with PLC
- Identify effective components of an impact and reporting system
- Models of consumer driven impact indicators
- National dialogue on family/work issues
- Specific action in support of discussion on chaordic organizations throughout the System
- Create leadership councils with paid and volunteer staff
- Director/administrator training re: organizational issues; e.g. diversity and pluralism, broadly funded base
- Customer "Bill of Rights"
- Models in shared leadership
- Investigate options for implementing standards on ethical decision-making
- Provide support for self-managed teams

These potential action areas were further reviewed and prioritized by the PODC the next day.

Areas Identified for Future Work

A. Existing Topics

1. Recruitment, Selection and Retention Work Group
2. Funding for Center for Diversity
3. Work/life survey
4. National Administrative Management Conference
5. National orientation of new human resource managers
6. Dissemination of guidelines (HR, financial management, etc.)
7. Human Resources Network
8. Structure and Function -- interpretation and dissemination

9. Influencing decision makers (broadening our base support)

B. New Topics

1. Public issues education
2. Environmental scanning for issues discussion
3. Identify how to work smarter
4. Innovative HR staffing patterns
5. Identify, review, update competencies, skills and attitudes for professionals in 21st century
6. Key issues dialogue across organizational spectrum
7. Recomposition of ECOP
8. Position paper on new models for and examples of effective "seamless" organizations
9. Create national funding sources directory
10. Position paper on formula funding
11. Identify successes for broadening funding
12. Position paper on successful models of positioning Extension in outreach area.