



University of Wisconsin-Extension
Cooperative Extension
nEXT Generation project

Work Group Structure

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nEXT Generation project Summary

Cathy Sandeen, Chancellor of the University of Wisconsin-Extension and University of Wisconsin Colleges, [commissioned](#) the *nEXT Generation* project in February 2016 to:

- Shape the future of Cooperative Extension while staying true to Cooperative Extension’s Purpose, Values, and Vision;
- Build a new organization and infrastructure for Cooperative Extension that is relevant, flexible, and digital; and
- Address the \$3.6 million structural budget deficit that compromises the current structure of educational delivery across Cooperative Extension.

The following table summarizes Chancellor Sandeen’s objectives for the *nEXT Generation* project.

Investment Area	Reduction Target	Objectives
County & Tribal Nations	\$1.2 million Annually	<ol style="list-style-type: none"> 1. UW Cooperative Extension will implement a multi-county area structure that provides shared administrative leadership to the area. 2. Maintain a Cooperative Extension office in each of the existing county and tribal offices. 3. Maintain single-county areas in high-population counties. 4. Develop a state-wide tribal support network that leverages resources to strengthen partnerships. 5. Establish the appropriate mix of faculty, academic staff, and university staff positions in each single- and multi-county area to best serve the needs of that area. 6. Evaluate and provide recommendations on expanded use of digital technology in appropriate areas of program delivery, educational product development and administration.
Campus & UW-Extension Specialists	\$1.7 million Annually	<ol style="list-style-type: none"> 1. Strategically reduce the number of campus and Cooperative Extension specialists and support positions. 2. Develop and implement mechanisms for the allocation of resources (a flexible pool of base, one-time, and other funds), accumulated over time used to address critical emerging issues or problems in the state that require special expertise beyond that available among existing faculty.
Administrative & Educational Program Support	\$0.7 million Annually	<ol style="list-style-type: none"> 1. Consolidate Cooperative Extension administrative functions with UW-Extension central administration where possible (e.g., IT, HR, business services, marketing), to leverage efficiency and flexibility while maintaining support of our mission. 2. Undertake a comprehensive analysis of the division’s overall revenue/resource portfolio, and recommend opportunities for enhanced mission-driven revenue generation and entrepreneurship.

Overview of Work Groups

What is a Work Group?

A Work Group is a team of individuals tasked with:

- Researching and analyzing a particular function across Cooperative Extension, county partners, tribal partners, UW institutions, and clientele;
- Identifying the current structure and processes for a function;
- Assessing whether the current structure and processes for a function meet Cooperative Extension's clients' needs;
- Determining how a function could be more effectively and efficiently managed in the future; and
- Developing recommendations for how that function could be managed in the future, depending on the scope and topic of the Work Group.

Most Work Groups will be asked to specifically focus on functions rather than particular offices and organizations – for example, a group looking at “Technology” will need to focus on the broader technical needs of the organization rather than just the Department of IT or Technology Services.

How will Work Groups be staffed?

Each Work Group will be led by a chair or co-chairs and will include five to 10 members. The Project Steering Committee will recommend Work Group members to the Executive Sponsors from the collected nominations; membership will be determined based on the needs of the Work Group in terms of:

- Subject matter expertise;
- Access to information and data;
- Creative and forward thinking; and
- Relevant skills.

Some chairs and members may serve on multiple Work Groups depending on the overlap of topics and flow of information between the Work Groups. Though the number of members must be limited from a practical standpoint, the Work Groups will reach out to other interested parties for feedback, including:

- External partners like counties, tribes, special interests, and UW campuses; and
- Individuals who were nominated but not selected for membership.

Who can serve on a Work Group?

The Executive Sponsors of the *nEXT Generation* project are inviting anyone interested in the future of Cooperative Extension who meets the criteria listed above to submit nominations for Work Groups. This includes, but is not limited to, the following list:

- **Cooperative Extension Employees:** All Cooperative Extension employees regardless of position or funding type;
- **County Partners:** County elected officials or county government employees connected to Cooperative Extension activities;
- **UW Campus Employees:** Employees of UW Campuses or UW-Extension Divisions that are engaged with Cooperative Extension;

- **External Organizational Stakeholders:** Other group or organizational members engaged in UW-Extension partnerships or collaborations; and
- **Volunteers and Participants:** Wisconsin residents serving as Cooperative Extension volunteers or participants of Cooperative Extension programs or activities.

What will the Work Groups be responsible for doing?

The exact steps that Work Groups follow and documents that they develop will differ depending upon the Work Group's topic and scope. Work Groups may be asked to perform one or all of the following activities depending on scope of their work:

- **Client Needs Assessment:** Determining what the external and internal clients of Cooperative Extension need from a particular function in the future.
- **Current Assessment:** Identifying current organizational structures, staffing levels and processes.
- **Gap Analysis:** Evaluating how Cooperative Extension meets clients' needs through the current organizational structures, staffing levels, and processes, and assessing where performance can be improved;
- **Future Recommendations:** Developing a list of options and making recommendations for how the organizations, staff, and processes could be structured in the future.

What are the expectations for Work Group members?

Work Group members should expect a significant time commitment on this project:

- **Timeframe:** Work is anticipated to begin in May or June, depending on the Work Group, and continue for the next four to eight months. Some Work Groups may be extended based on decisions throughout the course of the project.
- **Time Commitment:** Work Groups will likely meet at minimum once per week and Work Group members should anticipate committing at least eight hours per week on project-related work including meetings and independent preparatory activities. Work Groups may, at times, be asked to meet for multi-day working sessions in the course of the project.

Work Group members may have access to confidential or sensitive information in the course of their work on the project. The Executive Sponsors expect that all members will honor standard protocols on confidentiality and will review those protocols with the Work Group members before they begin work.

Are there any guiding principles for the Work Groups?

All Work Groups will be asked to focus on achieving the mission of the project as outlined in Chancellor Sandeen's February 10 report. Additionally, all Work Groups will be asked to focus on the following topics in the course of their activities:

- Staying true to the Purpose, Vision, and Values of Cooperative Extension;
- Emphasizing diversity & inclusion both within Cooperative Extension and in terms of the audiences Cooperative Extension serves;
- Expanding access to underserved populations across Wisconsin;
- Making educational and administrative processes more efficient and effective through technology;
- Building capacity among Cooperative Extension staff through professional development;
- Considering the strategic and financial impacts of their assessments and recommendations; and
- Contributing to the financial goals of the *nEXT Generation* project.

How will Work Groups be structured?

All Work Groups are assigned to one of four categories:

- **Programming:** What programs are delivered to the residents of Wisconsin?
- **Organizational Structure:** How are positions structured and organized across counties, tribes, multi-county areas, regions, UW campuses, and program areas?
- **Program Development:** How are programs planned, developed, delivered, implemented, and evaluated?
- **Support:** How are the staff and organizational structures supported administratively?

Each category will have between one to nine Work Groups. The Executive Sponsors in consultation with the Project Steering Committee may increase the number and modify the scope of the Work Groups depending on the needs of the project. Multiple Work Groups may touch on or analyze the same topic from different lenses given the interrelationships between Cooperative Extension functions. The Work Group chairs and the Project Steering Committee are responsible for coordinating and ensuring consistency across Work Groups.

How will Work Group members be supported?

Work Group members will have access to documentation, data, subject matter experts, and interested parties throughout their work. The Executive Sponsors and Project Steering Committee will also ensure that adequate training and guidance is provided to Work Group members to facilitate their work and consistency of work products throughout the project.

UW-Extension will cover the cost of all applicable travel expenses incurred by Work Group members in the course of their work on the *nEXT Generation* project.

What will happen as a result of the Work Groups' work?

The Work Groups will submit their work to the Project Steering Committee, who will review the analysis, options, and recommendations from the Work Groups. The Project Steering Committee will recommend to the Executive Sponsors the changes to be made to the organizational structure, processes, and staffing. The Executive Sponsors may ask the Work Groups to work out additional details on the future organizational structure and processes after these decisions have been made.

Programming Work Groups

Overview

The Programming Category will have four initial Work Groups responsible for identifying the programs that are delivered to Wisconsin residents within the current program areas. Later in the project, the chairs and some members of these Work Groups will collaboratively develop options and recommendations on the following topics:

- What programs Cooperative Extension could offer in the future;
- How these programs could be offered; and
- How programs could be organized within Cooperative Extension.

Descriptions of Work Groups

Name	Description
Agriculture & Natural Resources Extension	<p>Each of these four Work Groups will focus on the following topics for their respective program area:</p> <ul style="list-style-type: none"> • Identifying and cataloguing all educational programming that is currently provided; • Calculating the staffing and financial resources required to deliver the current programming; • Determining how current programming meets the needs of clientele; and • Identifying any unmet needs in this area.
Community, Natural Resources, & Economic Development	
Family Living Programs	
4-H Youth Development	

Organizational Structure Work Groups

Overview

The Organizational Structure Category will have two initial Work Groups addressing how specialists, educators, administrators, and support staff are structured around the state. These two Work Groups will focus on the general organizational structure across counties, tribes, regions, and program areas, but not on specific staff members, counties, or tribes.

The chairs and some members of these Work Groups will also collaborate to recommend how Cooperative Extension could structure the roles and responsibilities of educators and specialists in the future. These recommendations will focus on the general organizational structure and standard positions, including how multi-county areas could be used to consolidate administrative services and how educators will interact with and provide these services to counties in the future.

Descriptions of Work Groups

Name	Description
<p>State-wide Organizational Structure</p>	<p>This Work Group will focus on, but not be limited to, the following topics:</p> <ul style="list-style-type: none"> • Assessing the general organizational structure, positions, staffing levels, and responsibilities across all program areas among: <ul style="list-style-type: none"> ○ Specialists who are Cooperative Extension employees; ○ Specialists who are employed by UW campuses; and ○ Program Directors and related support staff; • Determining how specialists provide programming across the state and support programming within counties and tribes; • Describing what advancement opportunities exist for specialists, program administrators, and support staff; • Identifying what administrative activities specialists perform in addition to their programming duties; • Identifying how relationships and inter-institutional agreements between Cooperative Extension and UW campuses are maintained; and • Determining how the needs of specialists, program administrators, and support staff are currently being addressed, including support structures, career advancement, pay scale, etc.
<p>County & Tribal Organizational Structure</p>	<p>This Work Group will focus on, but not be limited to, the following topics:</p> <ul style="list-style-type: none"> • Assessing the current organizational structure, staffing levels, roles, and responsibilities across all regions, counties, and tribes among:

	<ul style="list-style-type: none">○ Educators and staff employed by Cooperative Extension located in county and tribal offices;○ Staff employed by counties and tribes who support Cooperative Extension activities; and○ Regional Directors and related support staff;● Determining how educators serve and provide programming to counties and tribes;● Describing what advancement opportunities exist for educators;● Identifying what administrative activities educators perform in addition to their programming duties;● Identifying how relationships and contracts between Cooperative Extension, counties, and tribes are maintained;● Determining how the needs of counties and tribes are currently being addressed; and● Determining how the needs of educators are currently being addressed, including support structures, career advancement, pay scale, etc.
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Program Development Work Group

Overview

The Program Development Category will have one initial Work Group addressing how programs are currently planned, developed, delivered, and evaluated across the state, and recommending how these functions could be more efficiently and effectively managed in the future.

Description of the Work Group

Name	Description
Program Development	<p>This Work Group will assess current program development and delivery practices, technologies, resources, functions and organizing structures within Cooperative Extension. In the context of this Work Group, program development will include, but not be limited to, the following topics:</p> <ul style="list-style-type: none">• Program Context: Understanding the context of educational programming and priority setting;• Program Theory of Change (Logic Model): Articulating both the theory of, and intended outcome(s) for change;• Program Instructional Design: Planning for instructional design and educational delivery, administration, and evaluation;• Program Delivery & Implementation: Conducting, monitoring and adjusting programs; and• Program Evaluation: Understanding and communicating change as a result of the program, evolving the program and/or bringing it to an end. <p>This Work Group will also recommend how these functions could be more efficiently and effectively managed in the future.</p>

Support Work Groups

Overview

The Support Category will have nine initial Work Groups addressing how administrative support functions are performed across Cooperative Extension. Chairs of the nine Support Work Groups will also meet as part of a coordinating committee to compare work products and ensure consistency of work products.

Descriptions of the Work Groups

Name	Description
<p>Strategic Resource Planning</p>	<p>This Work Group will focus on assessing how Cooperative Extension currently:</p> <ul style="list-style-type: none"> • Identifies strategic and educational priorities; • Aligns financial and human resources with strategic and educational priorities; and • Develops and reports against financial and strategic metrics at an organizational level. <p>This Work Group will also recommend how these functions could more efficiently and effectively be managed in the future.</p>
<p>Administrative Technology</p>	<p>This Work Group will focus on assessing how Cooperative Extension manages and maintains administrative technology systems across all levels of Cooperative Extension, including counties, tribes, UW campuses, and central UW-Extension offices. In the context of this Work Group, administrative technology will include, but not be limited to, the following topics:</p> <ul style="list-style-type: none"> • Communication Technology: Including email, Google Hangouts, Skype, WisLines, and telephones; • Document Storage: Including SharePoint, Google Drive, OneDrive, and other network resources; • Hardware: Including laptops, desktops, tablets, cellular phones, and mobile hot spots; • Internet Access: Focusing on internet access policies across Cooperative Extension; • Technical Support: Focusing on technical support staff and help desks; and • Technical Standards: Focusing on technical practices and policies across Cooperative Extension. <p>This Work Group will also recommend how these functions could more efficiently and effectively be managed in the future.</p>

Name	Description
<p>Business Services</p>	<p>This Work Group will focus on assessing the current accounting and purchasing practices across all levels of Cooperative Extension, including counties, tribes, UW campuses, and central UW-Extension offices. In the context of this Work Group, business services will include, but not be limited to, the following topics:</p> <ul style="list-style-type: none"> • Accounts Payable: Paying bills and invoices across all levels of Cooperative Extension; • Accounts Receivable: Collecting payment for services rendered by Cooperative Extension employees; and • Procurement: Purchasing and paying for goods and services through means like P-Cards, T-Cards, Purchase Orders, Request for Proposals (RFPs), etc. <p>This Work Group will also recommend how these functions could more efficiently and effectively be managed in the future.</p>
<p>Communication & Marketing</p>	<p>This Work Group will focus on assessing how Cooperative Extension shares its stories, impacts and outcomes with various audiences through strategic communications and marketing efforts. In the context of this Work Group, communications and marketing will include, but not be limited to, the following topics:</p> <ul style="list-style-type: none"> • Marketing campaigns through various channels (i.e. social media, blogs, print, television, logo wear); • Online presence and public websites; • Earned media through traditional media channels (i.e. print, television); and • Special events. <p>This Work Group will also recommend how these functions could more efficiently and effectively be managed in the future.</p>
<p>Cooperative Extension Academic Departments</p>	<p>This Work Group will focus on assessing the current structure and processes among the Cooperative Extension academic departments, including but not limited to the following topics:</p> <ul style="list-style-type: none"> • The number of academic departments; • The names and subject areas of academic departments; • Staffing and support within the academic departments; and • Processes to support Cooperative Extension faculty throughout their careers. <p>This Work Group will also recommend how these functions could more efficiently and effectively be managed in the future.</p>

Name	Description
<p>Extramural Funding</p>	<p>This Work Group will focus on assessing the current means of bringing financial resources into Cooperative Extension and UW-Extension. This assessment will cover the processes to apply for, obtain, and report on extramural funding across all levels of Cooperative Extension and UW-Extension, including counties, tribes, UW campuses, and central UW-Extension offices. In the context of this Work Group, extramural funding will include, but not be limited to, the following topics:</p> <ul style="list-style-type: none"> • Grants; • Contracts; • Gifts; and • Fees. <p>This Work Group will also recommend how these functions could more efficiently and effectively be managed in the future.</p>
<p>Human Resources</p>	<p>This Work Group will focus on assessing the current human resources practices and procedures at all levels of Cooperative Extension, including counties, tribes, UW campuses, and central UW-Extension offices, and across all employee classifications including University Staff, Academic Staff, Faculty, and administrators. In the context of this Work Group, human resources will include, but not be limited to, the following topics:</p> <ul style="list-style-type: none"> • Staffing: Hiring from the point of conception where the need to hire for a position is identified through the search, interview, reference/background checking, and on boarding processes; • Employment Changes: Supporting employees pursuing promotions, pay changes, title changes, and transfers; • Performance Support: Supporting employees in their job performance including ongoing feedback, annual reviews, recognition, and performance improvement plans; • Employee Relations: Consulting, facilitating, and resolving workplace issues among employees including conflict resolution, discipline, grievances, complaints, and accommodations; • Payroll & Benefits: Paying and offering benefits to employees including time tracking/approval, paid/unpaid/protected leave, and additional payments; and • Termination: Terminating employment with Cooperative Extension either through retirement, resignation, and involuntary termination. <p>This Work Group will also recommend how these functions could more efficiently and effectively be managed in the future.</p>

Name	Description
<p>Professional & Organizational Development</p>	<p>This Work Group will focus on assessing the current means of developing and training Cooperative Extension employees, including University Staff, Academic Staff, Faculty, and administrators, to improve their professional knowledge, competence, skills, and effectiveness. In the context of this Work Group, professional and organizational development will include, but not be limited to, the following topics:</p> <ul style="list-style-type: none"> • Training and education; • Personal and professional growth; • Peer mentoring; • Career advancement; • Leadership development; and • Professional organizations and associations. <p>This Work Group will also recommend how these functions could more efficiently and effectively be managed in the future.</p>
<p>Volunteer Support & Development</p>	<p>This Work Group will focus on assessing the current and future needs for volunteers and determining current processes for recruiting, managing, supporting, and developing volunteers across all levels of Cooperative Extension. This assessment will include identifying all current volunteers, determining their roles and responsibilities, and highlighting gaps across the organization. In the context of this Work Group, volunteer development and support will include, but not be limited to the following topics:</p> <ul style="list-style-type: none"> • Identification: Identifying how volunteers are recruited and how they find out about opportunities within Cooperative Extension; • Screening: Reviewing the application, screening, selection, and placement processes including background checks and limitations on volunteering; • Orientation: Assessing required training for all volunteers including expectations and insurance; • Training: Reviewing training and support provided to volunteers as they grow and develop in their roles; • Utilization: Building organizational capacity within Cooperative Extension programs through volunteers; • Recognition: Recognizing volunteers for their efforts and contributions to Cooperative Extension; and • Evaluation: Providing feedback, support, and coaching to volunteers and dismissing volunteers when appropriate. <p>This Work Group will also recommend how these functions could more efficiently and effectively be managed in the future.</p>