
Recommendations for Feedback

Date: February 9, 2017
To: Cooperative Extension Staff, Partners and Stakeholders
From: The Executive Sponsors of the nEXT Generation Project
Aaron Brower, Karl Martin, Steve Wildeck

Background

Since the beginning of the *nEXT Generation* project, we have been committed to obtaining input from our staff, partners and stakeholders. Input following the release of earlier recommendations in December of 2015 resulted in a new approach to our planning that [Chancellor Sandeen announced in February of 2016](#). Following [the completion of the nine original work groups in the fall of 2016](#), we launched the Integration Work Group in December to formally recommend changes to Cooperative Extension's structures, positions, and partnership agreements.

This document contains the first set of recommendations on the future structure of Cooperative Extension from the Integration Work Group. We are requesting feedback on these recommendations from any staff, partners, and stakeholders who are interested in the future of Cooperative Extension.

Scope of the Recommendations

Cooperative Extension is organized both around geography, as we deliver programs in communities throughout the state, and academic disciplines, as our faculty and staff provide education and research in a variety of content areas. The recommendations in this document focus on Cooperative Extension's geographic structure, specifically the partnership with Wisconsin counties.

We welcome feedback on these recommendations from anyone interested in the future of Cooperative Extension, but realize these recommendations might be of greatest interest to those in county offices and county governments. We anticipate releasing additional recommendations, like those related to campus or tribal partnerships, in the next few months as the Integration Work Group continues its work. Future feedback opportunities could be targeted to special topics most relevant to specific audiences. Our regular communication memos, released to the [project website](#) on Fridays, will include details on future feedback opportunities.

Feedback Process

As of February 9, an online [survey is available](#) to submit feedback on these recommendations. Anyone who is interested in providing feedback may complete this survey. The survey includes a set of targeted questions about these recommendations. We will close the survey on **February 23** at 5 p.m.

We will synthesize the feedback of this survey, review it with the Integration Work Group, and make final recommendations related to this feedback to Chancellor Sandeen for her approval later in February and March. Final decisions will be announced through our regular communication memos.

Your feedback will help inform the final decisions, plans, and schedule for implementation. Our goal is to finalize decisions this spring and begin implementation no later than July 1st. Implementation of project decisions will follow a rolling schedule, given that certain aspects must be in place before other changes can be made. We anticipate that most decisions will require a transition period.

Communications Timeline

What follows is the planned communications timeline for the *nEXT Generation* project in the coming weeks. If you have any questions, concerns, or feedback around the survey and recommendations, or would like to receive our project updates, we encourage you to contact us at nextgencommunications@ces.uwex.edu.

- **Daily Q&A Conference Calls:** The *nEXT Generation* Project Management Team will be holding a daily 30-minute conference call from 8:30 a.m. - 9:00 a.m. for questions related to the recommendations and survey from **February 10** through **February 23**. The conference line for these calls will be: (855) 947-8255, Passcode: 6137001. All are welcome to participate.
- **WCA Q&A Webinar:** WCA will be hosting a Q&A webinar with WCA Executive Director Mark O'Connell and Dean Karl Martin on **February 13** for WCA members.
- **Q&A with the Dean:** The *nEXT Generation* Project Management Team will hold a conference call with Dean Karl Martin to address questions about the recommendations and survey on **February 15** from 10:00 a.m.-11:00 a.m. The conference line for this call will be: (855) 947-8255, Passcode: 6137001. All are welcome to participate.

Summary of Recommendations

The Integration Work Group identified six core recommendations related to the structure and staffing for county offices in the future. These six recommendations are detailed on subsequent pages. We suggest reading these recommendations sequentially as the concepts presented in each lay the groundwork for subsequent recommendations.

- [Maintaining an Extension Office in Every County](#)
- [Restructuring Geographic Administration](#)
- [Connecting Counties/Tribes with Regional & Statewide Resources](#)
- [Differentiating County/Tribe-Based Educational Positions](#)
- [Sharing Educational Positions Across Counties/Tribes](#)
- [Establishing New Agreements Between Counties & Cooperative Extension](#)

We appreciate your patience with and interest in this project. With more than 100 years of history and partnership between the University of Wisconsin and counties, we take your feedback seriously. Given the time required to implement any changes to the structure of Cooperative Extension, we also hope that counties will maintain their future funding at a level similar to what it is currently.

We encourage you to contact us with any questions or comments at nextgencommunications@ces.uwex.edu.

Maintaining an Extension Office in Every County

Background

Through authority granted by both state statute and by UW System policy, Cooperative Extension is charged with fulfilling the Wisconsin Idea by providing the people of Wisconsin access to education beyond formal university classrooms. We currently have staff and offices in each of Wisconsin's 72 counties.

The Recommendation

Cooperative Extension will maintain an Extension Office in every county willing to commit to continued funding and space for Cooperative Extension staff. Cooperative Extension recognizes the value in keeping a local presence in every county and keeping the shortest distance possible between the people of Wisconsin and the Extension staff delivering programming to them.

Cooperative Extension requires dedicated office space for every staff member that the county is co-funding, along with necessary office supplies and access to appropriate space for programming. Cooperative Extension also requires consistent co-branding across all county offices to reflect the brand identities of both Cooperative Extension and the county government.

Rationale for the Recommendation

We feel that it is critical to maintain an Extension Office in every county that wants to continue partnering with Cooperative Extension to successfully accomplish Cooperative Extension's mission and continue the vibrant relationships with counties. The reasons for this recommendation are:

- **Proximity:** We want to maintain the shortest possible distance between Cooperative Extension staff and the people of Wisconsin that we serve to continue our focus on local issues and relevant education.
- **Accessibility:** We want to ensure that the people of Wisconsin and county governments can easily access the resources of the University of Wisconsin System and campuses through local Cooperative Extension staff.
- **Visibility:** We want to ensure that the partnership between Cooperative Extension and county governments is visible and prominent to continue promoting the county government's role as a provider of educational programming and services, and delivering on the Wisconsin Idea.

Restructuring Geographic Administration

Background

Cooperative Extension currently has multiple layers of administration responsible for managing county-based faculty and staff in all 72 county offices around the state. For example:

- **County-based Administrative Leadership:** Currently, 97 staff serve as County Department Heads and County Directors who are primarily responsible for managing county-based faculty and staff and the relationship with county governments. Some counties have one County Director; others have one, two, or three County Department Heads; and some have one County Director and one County Department Head.
 - There are four County Directors who are full-time or near full-time administrators responsible for large county offices with a minimum of 15 staff.
 - There are 93 County Department Heads who work an average of 25-30% of their time on administration and the remainder of their time delivering programming as an Educator.
 - County Governments partially fund all 93 of the County Department Heads and most of the four County Directors, typically providing 40% of the salary and fringe costs while Cooperative Extension funds the remaining 60%.
- **Regional Leadership:** Regional Directors are full-time administrators responsible for managing all county/tribal-based educators, County Department Heads, and County Directors in their regions. Regional Directors have ultimate hiring and budgetary authority for the counties they oversee, and are supported by part-time Regional Associates.
 - There are four regions, each covering 17 - 20 counties.
 - Cooperative Extension fully funds Regional Directors and their offices.
- **Central Leadership:** The Associate Dean is responsible for managing the four Regional Directors and ultimately reports to the Dean of Cooperative Extension.

The Recommendation

Cooperative Extension developed single- and multi-county areas for administrative purposes only. The [map of the Area boundaries](#) was announced in Chancellor Sandeen's February 2016 memo.

We recommend appointing one full-time Area Extension Director to lead each area; these Directors would:

- Be fully-funded by Cooperative Extension;
- Be responsible for managing the relationship with county governments and the county-based staff, including how to best represent Cooperative Extension at local meetings;
- Have ultimate hiring authority for the county-based staff in their area;
- Coordinate programming efforts in the county(ies) they oversee, by identifying needs in the communities;
- Leverage county, regional, and statewide resources to address those needs; and
- Develop program priorities and staffing plans with the county governments.

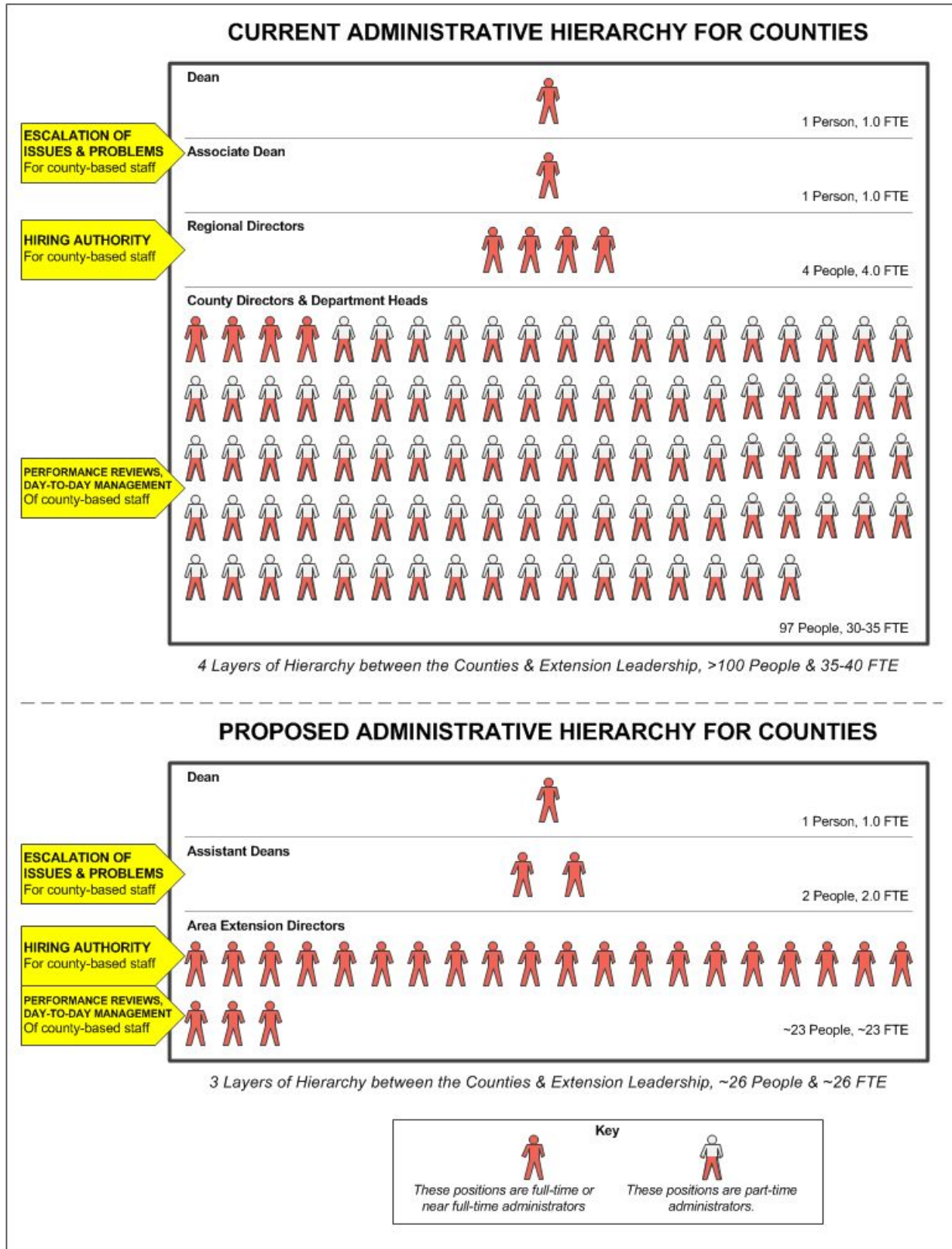
Two Assistant Deans would lead and manage roughly 10 - 15 Area Extension Directors each, and would report directly to the Dean of Cooperative Extension.

Rationale for the Recommendation

We feel that it is necessary to restructure the administrative leadership across all 72 counties to consolidate the number of staff working on administrative tasks and reduce the amount of effort expended on administration. The reasons for this recommendation are:

- **Focused Investment:** Because these Directors would be funded by Cooperative Extension, county funding would go directly to staff delivering programming in the counties - not to administration.
- **Advocacy:** Area Extension Directors would be a conduit to the broader Cooperative Extension network, linking counties and tribes to regional and statewide resources, including UW campuses and Cooperative Extension centers.
- **Commitment to Area Success:** Area Extension Directors would be dedicated to managing and administering extension programs in each county, and would not split their time between management, programming, and scholarship.
- **Efficiency:** As shown in [Figure 1](#), we want to reduce the amount of effort expended on administrative work (moving from 35-40 FTE spread across 100+ staff to ~26 FTE and individuals), and eliminate a layer of administration (moving from four layers in the current state to three).
- **Proximity:** Area Extension Directors would have direct hiring authority for county-based Cooperative Extension staff, moving decision-making closer to the county partners.

Figure 1: Current Administrative Structure versus Proposed Administrative Structure



Connecting Counties and Tribes with Regional & Statewide Resources

Background

Cooperative Extension has historically had two main groups of faculty and staff providing educational programming around the state:

- Locally-based **Educators** who deliver programming relevant to local populations and whose salary and fringe are funded 40% by the county or tribe and 60% by Cooperative Extension; and
- **Specialists** located in Cooperative Extension or on UW System campuses who focus on developing and delivering more specialized programming across the state and whose salary and fringe are funded by Cooperative Extension and/or a UW System campus.

Historically, if a county or tribe wanted programming in a particular academic area, then it needed to hire a county-based Educator. Specialists have provided programming to counties and tribes as well, but it has not always been easy for the Specialists to identify which counties needed programming or for the counties to identify which Specialists are available to meet their needs.

The Recommendation

We recommend that Cooperative Extension provide local communities improved, intentional access to regional outreach and research positions that would be primarily funded by Cooperative Extension. These positions may be housed in counties, in tribes, on UW campuses or in Extension centers, but would serve broad audiences based on local, regional, and statewide needs. Examples include:

- **Extension Specialists:** Faculty focused on performing applied research and scholarship in a specialized discipline in support of developing and delivering programs to local audiences and Cooperative Extension colleagues; and
- **Outreach Programmers:** Staff focused on developing and supporting programming through specialized content expertise and providing technical assistance to Cooperative Extension colleagues.

These faculty and staff would serve a broader geography with a deeper set of expertise. For example, an Extension Specialist focused on cranberry production might be located in a county Extension office and serve growers in all of Wisconsin's cranberry-growing counties, even if a cranberry-growing county does not invest in a local agricultural position.

Area Extension Directors would help coordinate with the Extension Specialists and Outreach Programmers to ensure local needs are met. For example, an Area Extension Director could call on these faculty and staff when a rapid response is required in a specialized area, such as a public health concern, to ensure the counties and tribes in their area have access to the necessary information.

We also recommend that Cooperative Extension continue to invest in positions based at UW campuses, in addition to these regional positions, and that these campus-based positions be connected with county-based and regional positions more intentionally through the Area Extension Directors.

Rationale for the Recommendation

The reasons for this recommendation are:

-
- **Accessibility:** Counties and tribes would be able to access educational programs even if they are not funding or housing these positions directly.
 - **Specialization:** These positions would be considerably more specialized in their areas of focus, enabling counties and tribes to access a broader and deeper array of educational programs and specialists.
 - **Flexibility & Speed:** These positions would enable counties and tribes to address emerging issues through new or adapted programs quickly and efficiently.

Differentiating County- and Tribe-Based Educational Positions

Background

There are roughly 350 locally-based faculty and staff serving as educators in Cooperative Extension - nearly half of all the faculty and staff in Cooperative Extension. This reflects our educational mission and our deep value of education. Practically, however, those serving as educators differ on a wide range of qualifications and responsibilities, like:

- Educational attainment, ranging from bachelor's degrees or high school diplomas (for peer educators) to doctorates (for research-focused faculty members);
- Employment relationships, ranging from annual staff appointments to tenured faculty positions; and
- Educational methods, ranging from providing community-based peer training to creating new educational programs by applying independent research.

Grouping staff with such a wide array of responsibilities and qualifications under the same position has created a number of issues. In some cases, the outlined responsibilities for a position may not match the qualifications or intentions. Also, some educators may perform similar responsibilities but have different qualifications or employment relationships (e.g., some may be tenured faculty while others may be academic staff).

The Recommendation

In addition to the regional and statewide positions listed in the previous recommendation, we recommend creating three different positions that counties or tribes may fund in the future:

- **Associate Extension Educators:** Staff with a high school diploma or bachelor's degree, focused on teaching, delivering programs, and providing educational services throughout the county or tribe. These staff would leverage curricula and educational materials developed by statewide resources based on the UW campuses and Extension centers;
- **Extension Educators:** Staff with a bachelor's degree or master's degree focused on independently adapting research-based programs to be most relevant to the residents of the county or tribe and delivering those programs to the residents; and
- **Program Coordinators:** Staff with a bachelor's degree or master's degree focused on providing operational support to volunteers and Associate Extension Educators delivering a specified program within a county or tribe.

These positions better align job responsibilities with educational qualifications. Staff serving in these positions would be aligned with a disciplinary focus (e.g., 4-H Community Club Program Coordinator, Organizational Development Extension Educator, FoodWise Associate Extension Educator). The use of these positions would be determined by program needs and not all of these positions would be utilized in a given program. For example, if a program is largely delivered by volunteers then it may require Program Coordinators, rather than Extension Educators.

Rationale for the Recommendation

The reasons for this recommendation are:

- **Alignment:** These new positions would better align the responsibilities with qualifications to ensure all faculty and staff are set up for success and that their programming efforts optimally use and leverage their talents, skills, and abilities.

- **Flexibility:** These positions would allow for more flexibility in how programs are delivered, and positively moves the organization away from the one-size-fits-all approach in the current model.
- **Diversified Applicant Pool:** There would be new opportunities for people with diverse experiences and backgrounds to apply for positions within the organization that were not there before because of minimum qualification barriers.

Sharing Educational Positions Across Counties/Tribes

Background

Of the 350 county-based Educators, roughly 250 are co-funded by the counties or tribes (the other 100 are largely funded through grants in the FoodWise program). Nearly 95% of these locally-funded Educators are assigned full-time to work with an individual county. Only 17 Educators are assigned to work in two counties and three Educators are assigned to work in three counties. Though some of these sharing relationships have been in place for years, most have emerged in the past two years to address vacancies in certain counties given reduced budgets.

The all-or-nothing approach of requiring counties to fund full-time Educator positions has created inequities across the state related to workload, retention, and accessibility. Some counties have hired an additional full-time Educator to meet a part-time programming need, while others have left certain programming needs unfulfilled because they could not fund or justify a full-time position. 4-H Youth Development Educators offer a good example of this situation: If a county wants to have the 4-H Community Club program, then they must fund at least one full-time 4-H Youth Development position. In one county, a full-time 4-H Youth Development Educator supports one club (five volunteers and 24 youth) while in another county, a full-time Educator supports 19 clubs (114 volunteers, and 344 youth). Although most 4-H Youth Development Educators provide programming beyond the 4-H Community Club program, this incongruence highlights the lack of flexibility in current hiring practices.

This all-or-nothing approach has also created a situation where many Educators must be generalists, covering a broad array of topics and programs. For example, Family Living Educators cover programs ranging from nutrition to financial literacy, parenting to drug addiction. Many of the initial nine Work Groups on the *nEXT Generation* project cited the need to allow Educators to specialize more into narrower disciplines, both to allow for richer programming and for Educators to stay current in the field. However, the current structure of one Educator to one county does not allow for specialization except in larger counties, like Milwaukee and Dane, that can support multiple Educators within the same discipline.

The Recommendation

We recommend allowing counties and tribes to share or hire part-time Associate Extension Educators, Extension Educators and Program Coordinators in the future. The Area Extension Directors would advise and guide counties and tribes on options for sharing staff based on their knowledge of the programming needs across neighboring counties and tribes.

As the examples in [Figure 2](#) illustrate, county and tribal assignments could take a variety of forms. Some counties and tribes may choose to continue funding full-time positions in the future; others may choose to split funding for certain positions with one or more counties and tribes. Given that areas are only administrative boundaries for the Area Extension Directors, counties or tribes would not be restricted to only co-funding positions with others in their area. For example, if two adjacent counties in two different areas determine that they each need a part-time Horticulture Associate Extension Educator, then the two Area Extension Directors would work together to hire and onboard one full-time staff member. In these situations, Cooperative Extension would identify one Area Extension Director as the formal hiring and managerial authority to avoid situations of staff having two direct supervisors.

Sharing staff could also allow for more specialized positions. As an example, if three neighboring counties identify that they each need Family Living programming, then they could each individually fund full-time

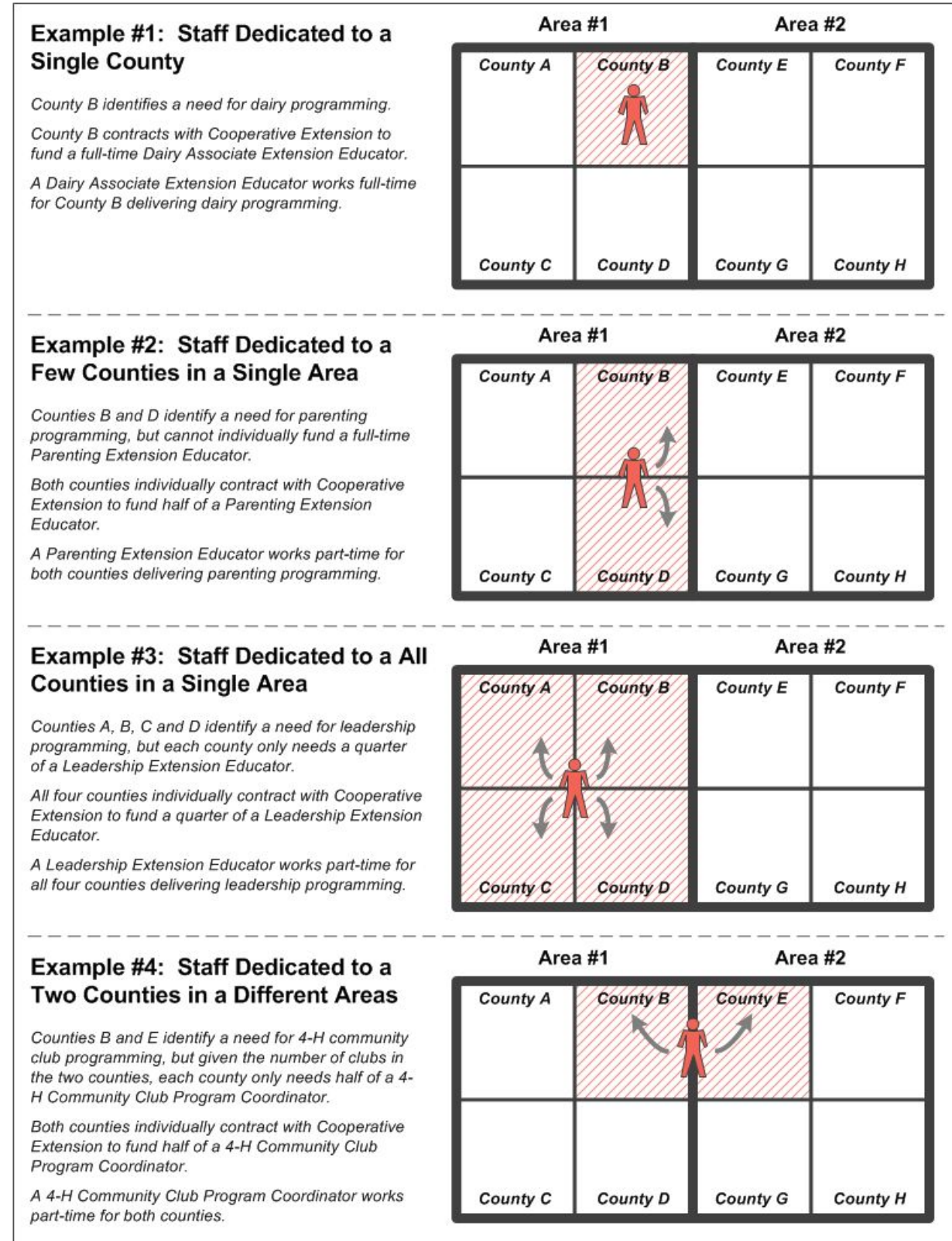
Family Living Extension Educators or they could collectively fund three specialized Extension Educators - one focused on parenting, one focused on nutrition, and one focused on financial literacy.

Rationale for the Recommendation

The reasons for this recommendation are:

- **Flexibility:** Counties and tribes would be able to fund part-time or full-time staff based on their programming needs.
- **Cost Sharing:** Counties and tribes would be able to split or share the costs for certain staff if they cannot fund full-time positions.
- **Specialization:** Cooperative Extension would be able to structure positions to be more specialized, offering counties and tribes the opportunity to more accurately meet their programming needs at a local level.

Figure 1: Examples of Possible Staff Sharing Configurations



Establishing New Agreements Between Counties & Cooperative Extension

Background

Currently, each county signs an annual contract with Cooperative Extension identifying the general programs they are funding and the amount that they are paying to Cooperative Extension. The amount of fees are determined based on the salary and fringe rates for the identified staff, who may be paid at different rates.

Determining county investment tied directly to salary and fringe costs creates a number of issues. It requires additional negotiation effort by both parties each time there is a staff change or a salary change. For example, whenever staff receive a raise or promotion, Cooperative Extension and the county need to negotiate for an increase in the fees. Also, if Cooperative Extension and the county determine that they need to shift staff between counties, then the contract must be renegotiated to reflect the difference in staff salaries even if the position remains the same.

In addition to contributing to salary and fringe in the annual contracts, counties set aside money in the county budgets for travel and professional development for the faculty and staff they fund. Since each county can have different expense policies, faculty and staff across Cooperative Extension receive different levels of support. Staff who are shared between counties need to navigate multiple counties' accounting systems and policies, plus those for Cooperative Extension.

Like expense and travel policies, IT policies and services also vary between counties.

The Recommendation

We recommend instituting two agreements between Cooperative Extension and individual counties in the future:

- An annual **Contract** identifying the FTE and types of positions that the county would fund and the fees for those positions; and
- A multi-year **Memoranda of Understanding** (MOU) to supplement the annual contracts that standardizes processes, expectations, and lines of authority between Cooperative Extension and the county.

The MOU would identify the types of services and programs that Cooperative Extension can provide to the county (depending on the positions it funds) and the types of services and resources the county would provide to Cooperative Extension (e.g., office space for staff, office supplies). The MOU would also outline general approval processes (e.g., hiring process and authority for new staff, approval process for annual contracts) and expectations for how the counties and Cooperative Extension would work together.

Building on the MOU, Area Extension Directors would develop an annual contract with individual counties that would identify the FTE and types of positions the county is funding (e.g., 1.0 FTE of 4-H Youth Development Program Coordinator, 0.5 FTE of Family Living Extension Educator). The contract would not contain the names of staff serving in those positions, just the position titles and associated FTE. The contract would be up for renegotiation annually to allow counties the opportunity to make changes based on their needs.

Each county would pay standard fees based on the discipline and position level (e.g., 1.0 FTE of a 4-H Youth Development Program Coordinator might cost a different amount than 1.0 FTE of a Master Gardener Program Coordinator). These fees would be relatively standard across the state, but Cooperative Extension could modify the fees charged to each county based on economic indicators.

These fees would cover the costs for salary, fringe, travel, professional development, and technology (e.g., hardware) for the staff funded by counties, meaning that the counties would not be required to separately set aside money and develop line items in their budgets for travel, technology, and professional development as they do currently.

Given that counties would pay standard fees for each position instead of specific staff, the fees would not change in a given year unless both parties agree to change the positions or FTE. For example, the fees for the counties would remain the same even if Cooperative Extension provides mid-year raises to the staff or if the county and Cooperative Extension agree to change staffing for a position before the next contract begins. These fees may change year-over-year based on the availability of funding, cost of living changes, and other metrics.

Rationale for the Recommendation

The reasons for this recommendation are:

- **Clarity:** Both Cooperative Extension and the counties would clearly understand their expectations, responsibilities, and lines of authority.
- **Transparency:** Counties would now have full information of and insight into the suite of programs and types of staff available to meet local needs.
- **Predictability:** Counties would now know their all-in costs for the contracts with Cooperative Extension at the beginning of the year, and would not need to adjust their budgets mid-year unless they decide to increase or decrease the FTE for their positions.
- **Reduced Administrative Burden:** Counties would not need to set aside separate funding and support for technology, travel, and professional development for Cooperative Extension staff (though funding would still be needed for county employees supporting Cooperative Extension), and would be able to reduce the amount of administrative effort required to support the Extension office.
- **Standardization:** Staff serving counties would have one set of policies and procedures to follow for travel, professional development, etc. rather than needing to follow the policies and procedures for each individual county plus Cooperative Extension.