

# NC Association of Cooperative Extension Specialists

## Strategic Planning Meeting Summary

February 6, 2015

NC State University, Room 203, 512 Brickhaven Drive, Raleigh, NC

**Facilitator:** Donna Rewalt

**Summary prepared by:** Mary Lou Addor, Joanna Massey Lelekacs, Jackie Miller and Eric McConnell

**Attending:** Mary Lou Addor, Andrew Behnke, Carolyn Bird, J. Dara Bloom, Lucy Bradley, Rhonda Conlon, David Green, Autumn Guin, Chris Gunter, Nichole Huff, Jay Jayaratne, Jessica Knight, Joanna Massey Lelekacs, Jackie McClelland, Eric McConnell, Mark Megalos, Jackie Miller, Gary Moore, Deanna Osmond, Jonathan Schultheis, Julia Storm, Steve Washburn, Niki Whitley.

*Note: This summary is strictly a compilation of ideas and suggestions given during the Winter Meeting. We recognize that relevancy of the information is determined by who is in the room as well as by who is not in the room. Action steps will be recommended to the association members at large based on final review by the Officers and Executive Committee members.*

### Highest Ranking Priorities for the Organization Identified by those in Attendance:

#### First Priority

- Focus Majority of Energy of the Association on Development of Tangible Benefits *(to be more relevant/impactful)*
- Mentoring / Professional Development *(role of the organization)*

#### Second Priority

- Advocacy for Extension Professionals *(role of the organization)*
- Collaboration *(topics to address)*
- Excellence / Professionalism *(known for)*

#### Third Priority

- Collaboration *(value provided to members)*
- Collaboration within Extension + with other departments *(known for)*
- Networking *(value provided to members)*
- Scholarship *(topics to address)*
- Specialist Efficiency, Tools, Etc. *(topics to address)*
- Support of Audiences *(known for)*

### 1. What value does NCACES provide for its members?

#### a. **Networking** \* 3rd priority

##### *Networking Opportunities*

- Networking
- Relationships/networking
- Sharing ideas
- Promoting service
- Exchange ideas
- Interdisciplinary networking within the organization
- Peer network

- Colleagues to pose/share ideas
- Create value together for the intersection of ext/teach/research focused predominantly on Ext.
- Connections!
- Source of networking

##### *Relationship Building*

- Sharing ideas
- Promoting service
- Connection to other specialists

### *Fellowship/ Community*

- Sharing ideas
- A community of Extension Specialists to which we all feel a part and are valued
- A shared voice
- Contact/familiarity with others in similar roles
- Community of people with shared goals

### *Information resource*

- Updating of critical information
- Open line of communication
- Can + sometimes does provide updates on some key issues or thoughts of where Extension is going or important information to be aware of

### **b. Collaboration \* 3rd priority**

#### *Connection to other departments*

- Collaboration between departments + specialists
- Does provide some contacts with specialists from other departments that you might not necessarily engage with
- Opportunity to learn about other disciplines w/ opp for interdisciplinary work
- Connection to other professionals in Extension
- Getting to know people in other departments

#### *Address shared issues*

- Chance to connect + address issues we share

- Shared strategies/tools
- Shared voice

### *Connection with Extension Administration*

- Opportunity for face to face conversations with Extension Administration
- Getting to know people in administration
- Access to Admin

### **c. Scholarship & Recognition**

- Service & recognition of outstanding service
- Recognition
- Acknowledging scholarship
- Education
- Awards

### **d. Leadership Skills**

- Development
- Refinement

### **e. Close Shop**

- About 20% attend, are paid [members]. Need to assess with them whether there is support for NCCES + how they want to move it forward.
- The majority of Extension faculty no longer show up. This group tends to be the same people. I think it would be better to close the organization + take aspects like technology training and move it into the departments so that ALL extension faculty are trained.

## 2. What role should NCACES play in the future?

### **a. Mentoring / Professional Development \*1st priority**

#### *Professional Development*

- professional development
- professional development to support excellence and cutting edge work
- professional development for new faculty/ new professionals
- education for new extension specialists – culture and history of extension, expectations, program evaluation
- learning more stuff of common interest (e.g. informal learning, program evaluations)

#### *Mentoring*

- -voice for specialist to agents
- -mentor other extension professionals for a successful and rewarding career (what your work

- products should be and how to communicate about your work)
- increase mentoring and networking amongst specialists

#### *Scholarship*

- define scholarship role of extension specialist within the university
- promotion of connected scholarship between departments
- advocate and promote extension scholarship

#### *Career Development/Advancement/Performance*

- facilitate discussion on RPT (research, promotion, and tenure) and the future
- resources to provide support during transition
- networking, education, representation, recognition

#### **b. Advocacy for Extension Professionals \*2nd priority**

*Advocacy for the personal and public value extension professionals bring to the publics they serve*

- Advocate for extension specialist who are typically viewed as lower than “regular” faculty.
  - o researchers \*\*\*
  - o teachers\*\*
  - o specialists in extension \*
- Advocate for extension faculty
- Advocate understanding of key role of specialists in land-grant institutions.
- Advocate and promote extension scholarship (duplicate/overlap thematic areas)

*Linking Administration and Specialists to target organizational needs*

- Provide connection with higher level administration
- Bring specialist together with administration
- Point of presence for specialists to convey organizational needs
- Voice for specialist to administration
- Help further the support of extension in departments
- NCACES should help specialists understand what is needed by the organization. Almost as if the meetings serve as a “charge” or “call to action” by administration (or each other)

*Recognition/Merit of Extension Work*

- provide input to how extension work is evaluated

#### **c. Collaboration**

*Facilitate collaboration on program and resources to develop/implement/sustain*

- forum for multi-disciplinary programs and/or grants
- do more brainstorming and collaborating on interdisciplinary projects (grants) especially involving youth
- facilitate social interaction and sharing of ideas

*Facilitate education about available resources (monetary, tool, techniques, processes, ...)*

- resource knowledge sharing/collaboration opportunities
- sharing resources
- facilitate social interaction and sharing of ideas (overlap)

#### **d. Role of Current Capacity**

- use current capacity of 11 directors to help build the organization
- use current capacity to define/build around services (pro develop, mentoring), performance, and standards
- ensure capacity of the 11 directors is multi-disciplinary across colleges, affiliations, positions with standing committees

#### **e. Informational**

- Inform specialist of key programs or changes coming or to be implemented

### **3. What topics should NCACES address?**

#### **a. Collaboration \*2nd priority**

*Inclusion*

- Inclusion of associates
- Creating win-win collaborations for members
- Building bridges between specialists

*Grant collaborations*

- Grant opportunities
- Development of nontraditional programs
- Multistate opportunities
- Connecting with new mission of county programs

*Multidisciplinary programs*

- Developing multi-disciplinary programs or grants

- Topics should be multidisciplinary and things that relate across content areas, e.g. food, public issues education

#### **b. Scholarship \*3rd priority**

- Excellence in scholarship
- Awards and recognition
- Guidelines for faculty with extension appointments in CALS, CNR
- Standardize recommendations for evaluating faculty for promotion and tenure as applicable
- Mentoring new faculty
- Extension value to UNC system and society

#### c. Specialist Efficiency, Tools, Etc. \*3rd priority

- In-service for specialists
- Cutting edge technology for presenting research and programs
- Ways to be more efficient or better at job
- Research methods, techniques, and strategies
- Online learning and teaching
- Skill building
- Communications
- Resource sharing

#### d. Future Direction and Vision

- Future direction inputs for Extension
- Changes within vision for/of a Specialist
- How to fit your work into Extension's new cores
  - some aspect of the core
- Choices and decisions for Specialist needs (hiring inputs)
- New tools
- Spotlight excellence
- Introduce opportunities
- Breaking news (branding, visioning, etc.)
- Food
- Public Service initiatives
- Advocacy- Extension role, compensation, and protection from funding cuts

### 4. What do we want to be known for?

#### a. Excellence/Professionalism \*2nd priority

##### *Recognition for scholarship*

- Facilitating recognition for excellence
- Promoting scholarship
- Excellence in Extension
- Specialists' professional development and recognition
- Leading Extension's future work
- A resource for NC Extension professionals - scholarship opportunities, networking, collaboration
- Should be known for / as overarching organization to acknowledge good work, to help deal with challenging issue and be a relevant voice for all specialists

##### *Organizational support for Extension Profession*

- Active defenders of value of Extension Specialists
- Promoting new ideas and practices in the state and region
- Promoting current best practices
- Support for specialists on program development and promotion
- The premier program that supports Extension professionals

#### b. Collaboration, within Extension + with Other Departments \* 3rd priority

- Building collaboration with other departments
- Create the link, the intersection between campus and county
- Excellence in teamwork to get things done / lead change
- Food – Fun – Fellowship
- Place to come for trading ideas & starting new projects in Extension
- Collaboration b/n content specialists
- Place of community: A place we can talk frankly and openly about how to do this job better

#### c. Support of Audiences \*3rd priority

- Group of specialists providing a strong service to Ext Agents
- What we bring to NC – our impacts that enrich the citizens of NC
- Excellent investment of time and dollars
- Creating opportunities
- Supporting county extension with development of excellent programs

#### d. The organization that refuses to 'Act like an organization'

## 5. What can NCACES do to become more relevant and impactful?

### A. Focus Majority of Energy of the Association on Development of Tangible Benefits \*1st priority

*Tangible Benefits that result in....*

#### 1. **Core Purpose/Personal and Public Value Identified**

*Develop a clearer purpose, one that is communicated to current and potential members, and describes the tangible activities and outcomes, the direct benefits for members.*

*Time together adds value (not meeting simply to meet)*

- i. ensure a component of informational
- ii. ensure a component of development
- iii. ensure a component of how I can add value

#### 2. **Program/Project/Professional Development**

*Develop Orientation Programs*

- a. establish orientation program for new professionals/specialists

*Fostering Networking Internally and Externally*

- a. develop meetings that foster collaboration of specialist across disciplines
- b. sponsor a program to build bridges between extension and other university departments
- c. create a platform to understand each other's work
- d. work together to really evaluate stakeholder needs and adjust our programming appropriately

*Developing the Venues for Networking/ Collaborations*

- a. create an annual open house with demonstrations, posters, and speakers
- b. develop a commodity group type meetings with NCACES to help guide our applied research and outreach
- c. larger annual gathering for networking, updates, and training (formal and informal)

#### 3. **Identify and Expand Scholarship**

- a. work by committee on issues affecting our organization in preparation of white papers or position papers
- b. educate deans and department heads on the realms (continuum) of scholarship that defines extension's work
- c. identify and define the realm of scholarship in extension (build from prior work that has been established)

### B. Create Processes that Support the Structure/Achievement of Tangible Benefits

*Communication/ Marketing of NCACES*

- a. more communication
- b. develop marketing presence
- c. promote NCACES (been in extension for 3 years and did not hear of NCACES until 12/14 – see Lou's recommendation to mitigate)

*Advocacy (provide a relevant voice extension professionals)*

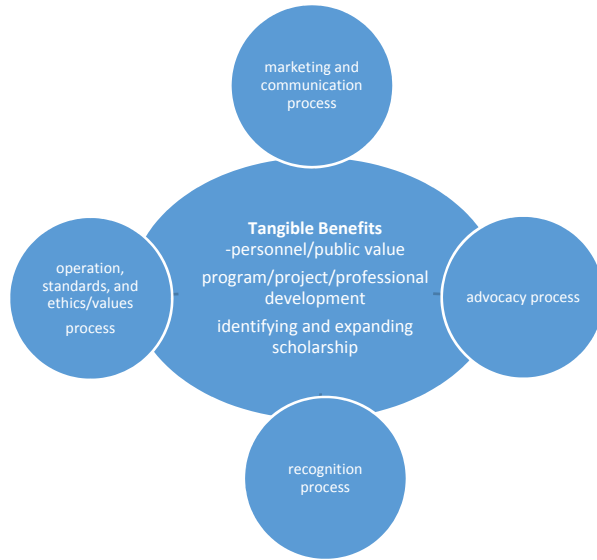
- a. be more cohesive and highlight all parts/groups of extension (FCS, 4-H, NR, Ag, Design, ..)
- b. ensure department heads are aware of extension and its role within the university
- c. build recognition about the scholarship of extension professionals with department heads and tenured faculty

*Operations/Standards (and values)*

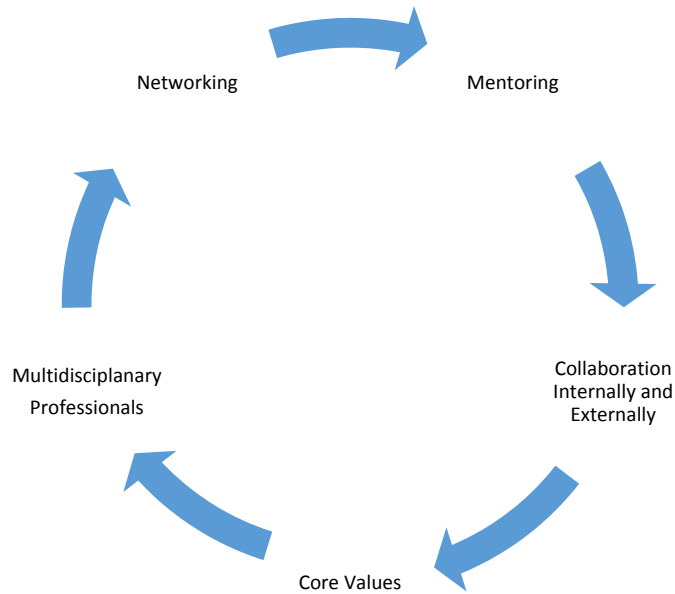
- a. mandate participation in association (for specialist)
- b. alternate meeting times and location to give more opportunities for other members to attend
- c. what are the values to guide ethical thinking and decision-making?

*Recognition*

- a. recognition of excellence



*Networking, Mentoring, Collaboration (internally and externally), Core Values, and Multidisciplinary Professionals Continually Circle the Core Purpose and Processes*



***Start Why  
Then What  
Then How***

## ONE THING *(One thing you recall from a previous engagement with NCACES that was important to you)*

- Meeting the “legends” as a newbie
- I am new to NC State. My colleagues connected me to the Association.
- 1<sup>st</sup> meeting I attended. Colleague brought me. Was not aware of the organization before. Suddenly felt I had a community of support for opps for new collaborations.
- Getting connected to others interested in estate planning and the Keeping the Farm event.
- Meeting specialists across the college
- Opportunity to build relationships with others in similar roles across the college – networking
- When we met in Talley and had 60+ people and had detailed administrative updates. Also we introduced new faculty members, Dept. Heads, DEL’s and faculty attended.
- At the 1<sup>st</sup> meeting I came to (last year), several award recipients spoke about their experiences/programs and I really enjoyed the opportunity to learn about different programs going on across the state.
- Issue of P+T has been a long-term challenge for faculty with majority Extension appt. This was a point of discussion and survey when serving as president of NCACES in the 1990s.
- What does scholarship mean within Extension (work started by Pat to push us forward in thinking what constitutes scholarship.
- Opportunity to share individual program experiences with other members of the association. For example, gave presentation on development, delivery and evaluation of the seafood food safety training workshop (1997 to present)
- Sharing of online tools – Dropbox, etc. very valuable tools and ways to make work easier.
- Karen DeBord invited me to come learn from my peers. She said it would help me network. That was 9 years ago now.
- This meeting → know more people now and connect more with them.
- Networking with other Specialists
- Given the recent Extension shifts in core focus areas, NCACES is helpful in staying involved in what’s ‘going on’
- None – I usually just come for extension director update
- My first meeting was Dec. 2014 and several members shared projects they were working on. It was good to know what others are doing in extension – keeps us more connected.
- Hearing the diversity of specialists and their work.
- The late 90s serving on NCACES Board. Understanding the depth, breadth, and ‘underbelly’ of Extension.
- Discussion on history of and what a specialist is.

## LIMITATIONS & CHALLENGES

### *Time*

- The time spent of projects within NCACES
- Time
- Time-pressured individual may be reluctant to contribute their time
- Time
- Fear – Over-commitment
- Everyone overextended – no available time
- Time to build an organization with so many other responsibilities

### *Finances - Money*

### *Promotion + tenure*

- Need to be sure Extension is well represented on all promotion and tenure committees which has not been consistent
- Departmental understanding and support of Extension scholarship

### *Lack of full leadership team*

- No Secretary

### *Technology*

- Distance (travel) – some programs do not work via e-learning
- Extension Technology resources mostly directed towards counties
- Lack of strong communication through website, listserv

### *Other*

- Understanding of potential (projects, interests, funding) for collaboration
- Long-term members will not be here much longer!
- Lack of knowledge concerning each other’s area of expertise
- Not able to think about change as a positive!
- Need a ‘recruitment’ plan to engage more of the specialists in the organization

## CAPACITIES & RESOURCES

### *Technology*

- Ext IT to develop website/listserv
- Technology resources

### *Competent and diverse membership*

- Diversity of expertise among the specialists in CALS
- Large diversity of expertise
- Dedicated people
- Great group here today – interested & engaged. Opportunities to delegate ideas and tasks.
- Extremely competent membership
- People
- Professional skills & experience – teaching/training, technology, research, connected networks
- Lots of experience from seasoned specialists

- Range of experience / range of perspectives (program areas)
- Expertise among the membership

### *Institutional memory*

- Organizational knowledge
- Long-term members who have institutional memory and can help provide history of the organization and Extension in NC

### *Other*

- Us!
- We can influence non-Extension faculty if we communicate our successes
- Openness to collaboration, interdisciplinary work
- Champions (unburdened by title/office)

## STANDING COMMITTEES – 2014-2015

### **Awards & Recognition**

- Chair – Susan Jakes
- Sarah Kirby
- Andrew Behnke

### **By-Laws**

- Chair – Carolyn Bird
- David Green (after May 2015)
- Joanna Lelekacs (after May 2015)

### **Officer & Board Nominations**

- Chair – James Jeuck
- Others TBD

### **Program**

- Chair – Joanna Lelekacs
- Others TBD

### **Specialist Promotion & Tenure**

- Chair – David Green
- Niki Whitley
- Autumn Guin
- Gary Moore
- Carolyn Bird
- *Pat Sobrero (retired)*

### **Website Development and Management**

- Chair – Joanna Massey Lelekacs
- Jackie Miller
- *Add consult w/ Rhonda Conlon for listserv /website development*
- *New listerv manager – Julia Storm*