2011 - 2014 eXtension Strategic Roadmap

In 2008, eXtension developed an eXtension Strategic Roadmap. It represented eXtension’s overall master plan for managing for success both for the long term (5-7 years) and short-term (1-3 years). In January 2011, a group of Cooperative Extension stakeholders met to review the Roadmap with the intent of updating it to address organizational goals and needs within a highly evolving digital educational marketplace. This summary briefly describes the process, findings, and action plans eXtension will pursue over the next few years.

The Process

● In 2010, the eXtension Governing Committee approved a strategic planning effort intended to update the eXtension Strategic Roadmap to build eXtension's capabilities into the future.

● Russ Roberts, a management consultant was hired to facilitate the planning effort. Russ served as the consultant responsible for helping to develop the original master plan -- the 2008-2010 eXtension Strategic Roadmap.

● A stakeholder survey was conducted in the Fall of 2010 targeting key stakeholders. The data collected from the online survey and through a number of personal interviews informed strategic planning process.

● An eXtension Progress Review Panel evaluated the status and direction of eXtension. Their evaluation and recommendations were based upon data collected from the stakeholder evaluation, performance summaries provided by eXtension staff, and needs of the Cooperative Extension System.

● Two strategic planning retreats were held with the first involving key Extension leadership and eXtension leaders. Work focused on understanding the needs of Cooperative Extension, competitive market indicators, and internal environments and the implications of these for eXtension’s future strategic direction. A second retreat for eXtension leaders involved an opportunity to contribute their ideas to the new strategic
roadmap, while aligning job accountabilities, values and behaviors with newly clarified strategic directions.

What We Learned—eXtension’s Challenges and Priorities

The timing of this strategic planning effort is important. eXtension has made good progress having reached many significant milestones toward fulfilling its mission; however, challenges remain as we seek to engage people and meet their changing educational needs. The following priorities represent key directions in what can best be described as a complex environment that presents both opportunities and challenges for success.

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<tr>
<th>Two Strategic Priorities</th>
<th>Content</th>
<th>Partnerships</th>
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<tbody>
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<td>Create richer, more compelling and engaging content, providing greater customer interaction and value, while creating impressive customer reach and CES brand awareness.</td>
<td>Build value-adding, fruitful relationships with collaboration partners in order to provide supplemental funding to cover development needs not achievable through USDA and CES funding alone.</td>
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<tr>
<th>Two Operational Priorities</th>
<th>Productivity</th>
<th>Capabilities</th>
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<td>Narrow our focus, re-allocate our time, and improve our productivity to meet our aggressive content development and partnership priorities. Accelerate progress well ahead of where we are today.</td>
<td>Continue to develop or acquire specialized services needed to fully operationalize our strategic roadmap with excellence (i.e., partnership development, content optimization and discoverability, etc.)</td>
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eXtension Moving Forward

As eXtension moves forward there are several important areas of focus, which will require careful planning and preparation, as well as close, ongoing attention in order to ensure they are successfully achieved during the next several years.

- Blockbuster Communities – This will involve substantially enhancing the customer experience to generate true transformative learning and greater customer reach. We will participate in:
○ **Learning Networks** - online areas where Communities of Practice and customers will engage in active learning and dialogue.

○ **Curation** - the process of network learning that involves adding context to content by categorizing, sense-making, commenting and/or remixing it to address individual learner needs. Interaction among Communities of Practice (CES) and other network members will help these learning networks focus on what is most important to individuals and create social learning.

Thus we will ensure customer involvement and collaboration to create true customer “delight.” This will be achieved through genuinely understanding and respecting customer expectations for Web-based communities and delivering against these expectations.

- Partnerships and funding – This will include securing successful sponsorships, partnerships, and collaborations that meet identified needs and provide the additional investment funding enabling eXtension to leverage its growth beyond levels attainable through existing sources of funding. We have as much to offer partners, as they have to offer to us.

- Local value enhancement – This involves creating useful and valuable content for Cooperative Extension specialists and county agents/educators, while ensuring they are aware of how to contribute, and how to access educational resources and information to help them to serve their constituents more efficiently and effectively.

- Performance measurement – This includes creating a dashboard of performance metrics that the entire Cooperative Extension System would find appropriate and acceptable.

- Productivity improvement – This involves placing available time and money against the highest payoff priorities while making the process of creating new subject matter networks more efficient and effective.

- Professional development – This involves providing professional development leadership for Cooperative Extension and offering professional development in areas that guarantee a 21st Century workforce i.e., new technologies, content and program development, and collaboration and sharing.

**Our Strategic Intent**

Perhaps the most visible sign of strategic direction for any organization is the language it uses to talk about itself. Mission, vision, values, goals...all words that tell stakeholders, employees, clients, and customers, in simple, understandable words what an organization is all about.
eXtension through this strategic planning process has identified a number of descriptors regarding its strategic intent.

eXtension, a critical asset of the Cooperative Extension System, will continue to serve the needs of new and traditional customers, partners and stakeholders through learning networks intended to engage them with the best and most relevant information and educational programming supported by Cooperative Extension nationwide. We will strive to assist our customers with the challenges they face, when they arise, with readily accessible information, expertise, and dialogue to help them make informed, educated, and sound decisions for we are all members of the same organization with the same goals and values.

Our competitive advantage draws upon these foundational strengths:

- **Customer-Focused:** eXtension is committed to engaging, understanding, and collaborating with our customers thus ensuring that information and educational programming are relevant and responsive to the needs of individuals.

- **A Trusted Brand:** eXtension is committed to providing access to objective, research-based, and credible information and educational programming. Subject matter professionals with high-level expertise and skills will develop content and programs, which will be further complemented through participation in learning networks.

- **Community-Based:** eXtension values customer engagement and participation in learning networks bound together by shared interests and enthusiasm for continued self-learning. Working in partnership with local educators, eXtension will extend and complement Cooperative Extension's interactions with customers and communities.

eXtension is an integral part of the Cooperative Extension System. It serves to ensure the greatest possible success of the entire System. eXtension will do this by:

- **Expanding the Cooperative Extension Service Network:** eXtension represents the organization’s subject matter interests and expertise joined together in learning networks and charged with supporting the information and educational needs of customers on the Web.

- **Facilitating the Development of Effective, Compelling Content and Learning Environments:** eXtension supports an appealing and easy-to-use workspace that attracts customers and fosters collaboration, while yielding interactive, high-quality information, useful in answering questions, solving life issues and stimulating interaction. Co-creation of content with one’s customers is a hallmark of the Internet. Organizations that have
learned to do this effectively have prospered through achieving greater “pull” – the ability to draw more customers into their network – which in turn further enrich and expand the content and attract even more customers.

- **Increasing Visibility:** eXtension, by providing relevant and timely access to high quality content and services, enhances the visibility of Cooperative Extension and reinforces the Cooperative Extension brand. We work with member institutions to increase content discoverability, while reducing duplicate and/or borrowed content.

- **Increasing Local Use and Value:** Employees can contribute and derive value from eXtension in many ways. People can share programmatic loads with colleagues, add breadth and depth to content offerings and know that programs will be maintained over time. Local offices are able to direct local customers to an alternative information source for questions and answers, as well as use, repackage, and brand content to support local programming. This allows local offices to operate more efficiently, allowing resources to be reinvested in other transformative educational efforts, thus increasing local use and value at a time CES needs to seek such efficiencies and cost savings.

- **Reaching More Customers:** Cooperative Extension reaches more customers through eXtension by providing greater access and availability, greater convenience, and by harnessing the power of networks, communities, search engines, social media and referrals.

Strategically, we encourage and foster the development of highly attractive and robust learning networks to address important market areas of interest and needs. We work to avoid duplication of effort, while emphasizing collaboration and team building.

Recognizing the changing nature and increasing expectations of web-based learning models, we emphasize practical creativity and cost-efficiency, while considering all possible approaches for developing quality content, building community, interacting with customers, sponsoring opportunities for collaboration, building to scale and measuring learning outcomes. We also seek partnerships with others including learners, developers and partner/sponsors, to grow and strengthen the value of our offerings.

We are committed to constant innovation to meet the ever-higher demands of customers regarding content, collaboration and functionality. This calls for organizational models that are new, different, and sometimes a departure from the organization we have been in the past. Therefore, where appropriate, we seek out and adapt brilliant ideas developed elsewhere for our own use. We share such best practices with our customers and partners to become better, reduce production costs, and remain competitive within the knowledge marketplace.
As we continue to mature, we will work hard to:

- **Demonstrate Our Value:** We will describe what success looks like and develop metrics that assess how we are progressing toward our shared vision. Such metrics will prove that eXtension is delivering as promised to our many stakeholders that include our investors, content and program contributors and local offices.

- **Strengthen Content Development:** Increase the pace, flow and richness of new learning content, reduce the time it takes for new learning networks to organize and begin work, and develop more overall cost-effective work processes. In general, content needs to be less passive and fusty, and more active, accessible and to the point, so that it grabs the attention of the customer.

- **Grow and Diversify Our Funding:** In order to ramp-up current processes and build to scale, we will identify and pursue additional funding sources including government partners, corporate sponsors, and industry collaborators, always assuring that our interests and values are well matched.

Our intent is to present a significant return on investment to our partners and supporters, thus justifying their continuing faith and support of eXtension. We pledge to help make all of Cooperative Extension a more vital, responsive, and viable entity for decades to come. By working together we will deliver on the promise and demands of the Smith-Lever Act in ways that reflect 21st century challenges and lifestyles. To that end we pledge to make Cooperative Extension more visible, distinctive, and in-demand, in ways that understand and assist our customer with the needs we were created to serve.

**Action Plans**

The Action Plans that follow were identified through the Strategic Planning process and they represent the highest priorities at this time. They will be supplemented with actual time lines and milestones upon which eXtension can act, react, and build over the coming years and months.

**Action Plan 1: User Focus**

**Situation**

There continues to be an exponential explosion in the amount of science-based information available to the public. We are competing for the public’s attention yet Cooperative Extension’s mission is to help people put science-based information to practical use. This explosion of information makes being found on the Web a significant issue for eXtension to address as it
magnifies the importance of search engine discoverability. Search is people’s first choice for finding information. The ability for eXtension’s high quality content to be discovered through search is a major issue and one that eXtension takes very seriously.

People’s ability to understand the latest scientific findings as they appear in refereed journals is limited. There is a tremendous need to fill the gap between the information that science is producing, and the people’s ability to understand and apply those findings. Solving these needs involves learner collaboration, which may be from a recognized member of a community/network, or a casual contributor via comments, reviews or rankings. “This new form of networked learning is an individual, disciplined process by which we make sense of information, observations and ideas. In the past it may have been keeping a journal, writing letters or having conversations. These are still valid, but with digital media we can add context by categorizing, commenting or even remixing it. We can also store digital media for easy retrieval. This new wave of learning gives us more ways to connect with others in our learning.” Interaction among community/network members, including CES and non-CES members, will help learning networks focus on what is most important to individuals and create socially curated information flows-- social learning.

There are opportunities for niche curation provided by trusted and non-biased people. The very nature of communication is changing to socially curated information flows. This is an area of great flux, and many people are struggling to make sense of this new knowledge landscape. This is strength and a strategic advantage for the Cooperative Extension System. Filtering information and providing context has been at the core of Extension work for over a decade. These practices have moved online, and so must Cooperative Extension be proactive in responding if we are to continue to be a valued contributor to this new form of networked learning.

eXtension has developed an infrastructure to support content development and collaboration...and we continue to move the organization forward in social media...that said, if we are to become as vital in the online space as we are in geographic communities we need to focus more attention on engaging the audience and the following recommendations that direct us toward that end.

**Recommendations**

- Use this opportunity to comprehensively discuss and map out how we need all the components of eXtension to flow and work together. Transform [extension.org](http://extension.org) into an environment where discovery, discussions, sharing new research findings, creating value added content, creating information, enriching user engagement, and learning opportunities around areas of interest can occur and flourish.
- Build a system that includes the elements present in other successful social media applications: user generated content, ease of use, open content licensing, flatness, social networking, and an algorithmically based recommendation engine. The recommendation
engine will be at the heart of addressing market analysis and focusing the Extension system’s need to be out-in-front of emerging societal issues. Build into the system robust metrics and data visualizations to assist in determining impacts and success stories of learning networks.

- Develop a recommender system (an information filtering technique that surfaces information based on known interests users/communities) to help reduce the time between when new scientific discoveries are unveiled, and their use in addressing real-world problems. There is an opportunity to create new tools to assist in combining the real-time Web, algorithmic and social search, and content curation. Such a tool could be instrumental in providing conversational links to eXtension resources increasing site traffic, and enhancing public engagement and learning around the latest scientific discoveries. This is an essential tool needed to increase Extension’s engagement in the online space. This tool will increase site traffic, exponentially increase Extension’s contact with the public in online spaces, and directly address Cooperative Extension’s need to be involved in learning networks. This step is an absolute necessity if Extension is to provide meaningful impacts in serving online learners.

- Develop strategies to increase search discoverability that includes an emphasis on publishing original content through eXtension rather than duplicating and/or borrowing content from other resources.

- Develop a second generation Ask an Expert system to take advantage of user engagement to serve as a learning and conversation hub. Mechanisms need to be explored to publicly expose these answers, and to facilitate conversations and learning around them.

- Develop a system and best management practices to facilitate efficient and time saving mechanism for learning networks on curation of information, interaction with and management of user input and contributions.

- Incorporate way(s) to recognize our top users/contributors/reviewers

- Create a task force made up of content management board members, customers, and eXtension staff to develop guidelines for measuring effectiveness of learning networks working in this new environment. From this work should emerge learning network behavioral models that can be shared as models to be rewarded.

- eXtension is available in a mobile format; however, we will continue to enhance our presentation on mobile devices. Learning networks will show interest in developing mobile apps; therefore, eXtension will establish a national dialog to develop effective strategies and guidelines for the system.

- Generate reports on user collaboration success stories from within CES and industry. There is great value in listening to learning networks and creating such success stories.

- Create reports of low performing content as determined by lack of user involvement and low Web usage data to be shared monthly with learning communities so they can deal appropriately with such content.
Action Plan 2: Partnerships & Funding

Situation
For eXtension to grow and develop additional funding is needed; however, given the current status of federal and state funding, the best options for increasing financial support may lie in the pursuit of partnerships with both public and private organizations. In this endeavor, it is recognized that eXtension is a part of and works on behalf of the Cooperative Extension System. Additional funding derived from new and enhanced partnerships will be used to support the growth and development of new and expanding subject matter learning communities led by member institutions, a changing technical infrastructure, professional development, and the development of educational products to serve diverse audiences. Annual financial support comes from two primary sources, institutional investments based on .08% of a member institution’s federal formula funding for Cooperative Extension, and the federal line New Technologies for Ag Extension (NTAE). This work of forming and enhancing partnerships and funding is on behalf of member institutions as they work to develop eXtension.

USDA agencies are a primary area of focus for establishing new partnerships. eXtension already has established relationships with a number of USDA leaders and agencies and many have demonstrated interest in potential partnerships. We need to continue to cultivate “friends of eXtension” by identifying shared interests and pursuing substantial subject matter knowledge and high quality content.

Considering the rallying call for a smaller government, reducing costs and avoiding duplication, other federal departments and agencies can be potential partners. Cooperative Extension (and eXtension) should be in a strong position to be the lead in the dissemination of high quality, research-based information to improve communities, businesses, local governmental agencies and non-governmental organizations (NGOs) for all major federal agencies. There is no reasonable way for all federal agencies to duplicate/re-create the education and outreach network we have throughout the Land-grant system. This should resonate well in Congress and within the leadership of federal departments and agencies such as the Departments of Energy, Health, Defense, Commerce, Transportation, the Environmental Protection Agency, among others. Our history as a strong partner with USDA for decades, with the Department of Commerce through Sea Grant, and the Department of Defense in the past decade should present strong evidence for efficiency, success and impact. We need to develop this concept and find Congressional champions willing to make this case.

Additionally, private companies and foundations represent potential sponsors and/or contractors who may expect something in return for their dollars (i.e. sponsorship and recognition on the
eXtension continues to evolve into a collection of high-value products and services capable of meeting a variety of individual and institutional needs. The truly distinguishing characteristic of what eXtension provides is the problem solving that accompanies the information. This occurs both in the form of Ask an Expert applications, and through the exchange of information, ideas and viewpoints among a community of people who can help each other in the application of subject matter specific information to their individual problems and needs. With the availability of professional education services (a national “learning” network) and the development of new engagement and content applications, eXtension provides a growing list of products and services that can be used to leverage partnerships.

Recommendations

- Inform and seek support for the eXtension budget plan from state directors and administrators.
- Develop models and strategies to grow and develop eXtension that include new and expanding subject matter learning networks.
- Establish and launch a revised funding plan to increase financial support of eXtension considering all available sources of revenue generation. The Governing Committee, as charged by Extension Committee on Organization and Policy (ECOP), will lead this effort through the work of the eXtension Finance Task Force.
- Pursue greater inclusion of member institutions in USDA-NIFA competitive grant programs.
- Encourage state Extension organizations to include eXtension in their grant applications for content development and delivery.
- Pursue partnerships with USDA agencies including, but not limited to (i.e., Foreign Ag Service, Farm Service Agency, Rural Development, Agricultural Research Service, Natural Resources Conservation Service, Food & Nutrition, Forest Service, National Agricultural Library, and others). Collaborate with the Extension Committee on Organization and Policy (ECOP), as appropriate.
- Pursue partnerships with federal departments and agencies (i.e. Department of Housing and Urban Development, National Science Foundation (NSF), Departments of Health and Human Services, Department of Energy, Department of Education, other than USDA. Collaborate with the Extension Committee on Organization and Policy (ECOP), as appropriate.
- In cooperation with ECOP, develop a team of “champions” to pursue government partnerships. This “bird dog” group should keep watch for potential applications of Cooperative Extension/eXtension product and service solutions.
- Help CoPs write proposals to federal departments and agencies.
Encourage state directors and administrators to continue their investments in eXtension, while working to increase other sources of funding.

Use eXtension products and services to leverage new partnerships that add local program value to member institutions.

Reach out to others in the Land-grant system (i.e., research, teaching) to join eXtension; new engagement and content applications could help leverage their ability to reach target audiences.

Develop a strong marketing plan for private sponsors to increase the number and amounts of commercial sponsorships, grants and contracts. Such support will be needed in order to sustain aggressive development and strong stewardship leading to cutting edge content that is continually updated.

Prioritize the list of current and prospective subject matter content areas based on their ability to attract private support.

More actively engage CoPs and other key Extension personnel in fundraising activities.

Encourage sponsors to join and participate in subject matter learning networks, as appropriate.

Ask CoPs to tailor and implement funding plans targeting sponsorships.

Enhance content offerings through partnerships with commercial providers.

Develop domestic (non Land-grant institutions) and international memberships, as appropriate, to increase support of eXtension both financially and in content offerings.

Develop fundraising goals for the eXtension Foundation.

Establish and charge an eXtension Foundation advisory board to help generate partnerships and increase revenue.

Consider establishing an indirect cost rate to use in managing federal grants and contracts.

Hire a vendor to assist with public/private development.

Develop and distribute fee-based educational programs.

Sell online educational programs and publications through other distribution channels for negotiated royalties (e.g., ePubs and eBooks through commercial distribution channels).

Consider social media and Google advertising to promote products, services and programs, as appropriate.

### Action Plan 3: Content Development

#### Situation

Content development in eXtension has been considered laborious. Community of Practice members have yet to figure out how customer input can be constructively collected and added to content to increase its usefulness. Therefore, eXtension plans to streamline barriers to participation and provide resources that make it easier to create higher quality content more efficiently, while at the same time incorporating user input and enabling co-creation. High value
engagement in social networks will be critical for communities to achieve a holistic group of both educators and customers that supports more dynamic and remarkable learning.

Customer involvement in content development and product evaluation is commonplace on the Internet today. As noted earlier, eXtension Communities of Practice will work in learning networks: experts and customers engaging in active learning and dialogue relevant to network needs. It is a process of working in a new and broader way. Existing Communities of Practice should be participating and creating content in learning networks where their customers reside. In doing so, the customer is actively participating in content development and discussions.

**Recommendations**

- Modify the way Communities of Practice function to ensure that they actively participate in learning networks. Those successful communities will exhibit the following characteristics:
  - Participate in the daily flow of conversations that occur around subject areas.
  - Be timely in engagement
  - Engage customers in content development
  - Share current scientific findings
  - Educate customers on emerging research
  - Engage in conversations and listening to network members
  - Actively participate in Ask an Expert

- Use revised CoP application process for lowering the barriers of all to participate in content development and involvement in eXtension; doing so will increase the amount of and add value to content and programs.

- Create a task force to determine priority of user involvement in co-creation of content and how CoP members and customers work together, receive recognition and interact. This prioritization would result in a new vision for content development, focus, and the format(s) of delivery. The new vision would be shared with all CoPs.

- Develop an optimization strategy designed to develop high reach, high loyalty and compelling CoPs. We need to identify what success looks like and how to measure it. A portfolio strategy is needed that emphasizes design alternatives and best practices for improving quality and discoverability, while reducing development time and cost.

- Continue supporting Content Reviews (Brain Traffic) and enhancements to maximize search engine optimization (SEO). Create working models of ideal, original content to support best practices. Aggressively monitor developments in SEO and proactively educate learning communities to maximize discoverability.

- Create eCourse(s) for CoPs that address routine content development topics and questions in an effort to conserve staff time, build expert confidence in social networks by teaching and engaging them in using social spaces, use of social networks and online
conferencing to drive engagement, and co-creation of content and content strategies between eXtension staff and learning networks.

- Implement more aggressive modes of communication with CoP content creators through the use daily activity recommendations. Such recommendations could be delivered through video messages entitled the “eXtension Minute.” Topics would include:
  - 30-Day Plan of recommendations for forming a CoP
  - 45-Day Plan of recommendations to promoting/launching a CoP
  - Recommended professional development programs
  - Recommended professional development readings
  - Other supportive materials/activities that facilitate a clearer understanding of Extension (eXtension) and a highly engaged and productive learning network
  - Educate CoP members on how people use the web and find content; how they want to interact and provide input; and how users are working in the Internet world.
  - Offer training to content developers to become curators of knowledge in subject areas within their learning networks (curation is being a steward of the best and most relevant content in a given subject by continually finding the latest research, information, related groups, and/or creating new content then organizing and sharing that content online). Cooperative Extension Professionals would be very adept at performing this task.

- Create a task force to explore options for recognizing positive activity of individuals in learning networks by issuing (virtual kudos) badges, leader boards, and awards to promote transformational learning that supports remarkable learning networks.

- Create an eXtension Support Task Force to determine viable methods of customer support of learning networks with possible inclusion of AaE integration with eXtension’s content creation tools.

- Explore opportunities where eXtension can serve in a leadership role in the development and delivery of information in new engaging formats that would benefit and extend the reach of CES. Such formats would include eBooks, mobile and desktop apps and similar tools.

**Action Plan 4: Shared Vision**

**Situation**
Not everyone has the same view and opinion of eXtension and its relationship to Cooperative Extension. Many factors impact this status, but a big part of why this occurs is that we don’t share a common picture of what success for eXtension looks like; how it’s going to make our work easier, better, and provide improved service to constituents and fundamentally that is it an integral part of Cooperative Extension.
More peer-to-peer conversations would appear to be an important part of the solution. Focusing on achieving demonstrable evidence of real success and value delivered will help this. One way to broaden and increase this shared vision will be to analyze the current advisory and governance bodies working in eXtension and determine the best mix and fit for representation from both within and outside of Cooperative Extension. Another is to develop a consensus within Cooperative Extension of what constitutes success in eXtension.

**Recommendations**

- Define success for eXtension and determine which metrics or factors will be the basis for future evaluation of eXtension. Share these success factors broadly.
- Create external Customer Advisory Council to offer eXtension advice on customer needs.
- Identify and convene a broad working group of Extension stakeholders (e.g., state directors and administrators, specialists, agents/educators) to come together to describe a shared vision and address the issues related to this action plan (e.g., success factors and metrics to document them, institutionalization, participation and use at the local level, reducing the gap between those engaged in eXtension and those that are not, demonstrating added value to Cooperative Extension programming, etc.) and to develop a set of meaningful strategies and outcomes the Extension system can buy into that will reflect what success means for eXtension and Extension.
- Establish Institutional Team Advisory Council to enhance our institutional team plan and assist Institutional Teams in the development of a shared vision.
- Continue to build our Institutional Team force.
- Develop and implement a national rapid response strategy to help CES and eXtension respond quickly to issues of national or regional importance, i.e., flooding, tornadoes, equine herpes, etc.
- Resume state visits to work with state directors and Institutional Teams to achieve greater institutionalization of and participation in eXtension.
- Empower Institutional Teams beyond current status levels and recognize outstanding institutional teams and members.
- Continue to work with directors and administrators to incorporate eXtension contributions of faculty and staff into merit evaluation criteria and promotion and tenure processes.
- Continue to conduct National virtual eXtension Conferences, as appropriate; consider scheduling a face-to-face national eXtension Conference.
- Add two non-CES individuals to the eXtension Governing Committee, people who will add unique perspective to the development of eXtension i.e., customer focus, expertise in online community development and engagement
- Assess all current eXtension Advisory Groups for efficacy and need.
• Reorganize the eXtension Director’s Council into a strategy board that would include representation from NIFA, learning networks, customers, agents/educators, and mid-level managers (i.e., regional staff, department heads).
• Build professional development around the value of eXtension to enhance/build shared vision.
• Assess the optimum frequency of meetings for all advisory boards, i.e. Governing Committee, Director’s Council, and advisory committees.
• Develop a list of criteria that will demonstrate full implementation of eXtension at the institutional level.
• Develop a recognition program for member institutions that fully integrate eXtension into Cooperative Extension programs. Coordinate such recognition with the Extension Committee on Organization and Policy (ECOP).
• Develop strategy and implementation for promoting CES and eXtension via search and social media.
• Conduct a national needs assessment to help design and develop professional development programs to help faculty and staff learn how to use eXtension to make their work better and easier.

Action Plan 5: Transparency and Accountability

Situation
eXtension lacks a simple, vetted set of performance metrics that all of the Cooperative Extension System (CES) finds credible and relevant. This frustrates many stakeholders, even though they themselves can’t articulate what those metrics might be. Despite the annual progress review panel effort, we’re really not clear about whether we’re transforming the system or meeting user needs. This causes eXtension leadership to have to invest too much of its limited time reporting on what measure of progress, we do have, which for some stakeholders are largely unconvincing. We have made thoughtful attempts that have not been enthusiastically or uniformly received.

In addition, continued evaluation assistance needs to be provided to CoPs to further their understanding, appreciation, and work on evaluating and reporting the use of informational materials posted to the public website, outcomes/impacts of their educational materials on the public website (where appropriate), and efforts towards establishing learning networks among CES staff and other stakeholders and clientele.

We are not presently evaluating the reach we are creating with our CoPs. We lack an evaluation process that truly measures everything we need our CoPs to create including reach and engagement.
Many stakeholders still have the impression that eXtension is primarily a stand-alone program. While it can operate in specific situations as a stand-alone program, it is primarily a resource that can be used to supplement state and local programs and the way that we do Extension work. As we are also encouraging our CoPs to establish learning networks to engage with clientele in new digital environments through social media, evaluation efforts will also need to be devoted to appropriately documenting these efforts.

**Recommendations**

- Re-examine the mix of performance metrics that we have been communicating with the CES and work to define and develop a set of simple, vetted performance metrics that all of CES finds credible and relevant in a learning network environment.
- Investigate ways to involve CoPs, specifically the Evaluation CoP in determining performance metrics that are credible and relevant.
- Foster a national dialogue to develop a set of national guidelines on developing critical and relevant metrics to help decision makers understand the significance of how CES online content and resources are used and evaluated in Extension work.
- Investigate social media analytic tools and determine reach and engagement metrics that we want to measure as well as applications needed to measure for these metrics.
- Collaborate with the Military Families Initiative and the Network Literacy learning community to pilot the social media analytics metrics.
- Continue to work with CoPs to document and measure outputs, outcomes, and impacts of their work in eXtension.
- Investigate new approaches for determining customer feedback and satisfaction, usability testing of the site and specific applications (e.g., FAQs, AaE, curation), and impact assessment (e.g., narrative based research along the lines of Cognitive Edge).
- Continue working on documenting transformation from eXtension, especially at the local level (eXtension Toolbox Project).
- Work on developing an evaluation strategy to more fully document the efforts and outcomes of Moodle courses (both internal and external).
- Continue to develop reporting mechanisms and resources that convey the outputs, outcomes, and value CES derives from eXtension.
- Continue and enhance development of The Scholarship of eXtension page to promote and gauge the scholarship of eXtension. Engage land grant institutions in sharing and incorporating eXtension into tenure and promotion, and annual faculty report guidelines.
- Continue to report eXtension progress made to the CES through documents such as the Return on Investment, State and Institutional Reports, Overall eXtension Metrics Report, and learning communities’ outcomes/impact reports.
- Conduct an abridged two-year progress review of the eXtension Initiative (at the end of 2012) and a more comprehensive progress review at the end of 2014.
Action Plan 6: Professional Development

Situation
We have a valued Professional Development program that is used across the Cooperative Extension System, both to share and receive professional development (skills and knowledge attained for both personal development and career advancement) in a variety of technologies and subject matter areas. The creation of eXtension Learn (learn.extension.org) has been helpful in guiding learners to scheduled web conferences and the recordings of those conferences. Learning Networks targeting professional development for Extension staff have been formally recognized and supported by eXtension.

While eXtension’s professional development offerings have broadened over the past year, and many states find value in the sessions, work can still be done to reach a broader audience, engage with more leaders and innovators in various subject matter networks in Extension, and to find “big name” speakers in key topic areas. In addition, the Learning Networks need more encouragement to provide and share learning opportunities for others within Cooperative Extension. It will be important to quell any notion that eXtension professional development is just technology stuff, and possibly not relevant to Extension employees.

eXtension Learn has become useful to those who know about it, but many still are unaware of it, and how they can benefit from it. In addition, perhaps additional social features would be helpful, but care needs to be taken that it doesn’t get more confusing as use increases.

Recommendations
- Rename as the National Cooperative Extension Professional Development Network
- Identify recognized experts able to speak to Extension topics relevant to a broad range of Extension educators. Schedule frequent online or video conferences that allow for dialogue with these experts and with other learners; promote these conferences nationwide through Extension Director/Administrator and other relevant email lists. Include as events on the CES Facebook page.
- Develop a working relationship with Program and Staff Development specialists throughout CES. Include them in planning, organizing, and then marketing these Extension education sessions within their respective states. Encourage them to add any professional development that is open to anyone in Extension into eXtension Learn to make it one national resource pointing to system wide professional development.
- Modify eXtension Learn to make it more social; e.g., adding a place to have conversations about each session, provide feedback, share/like buttons for other social
media sites. For example, people who found this topic of interest might also find this session of interest.

- Encourage all CES institutions to open their professional development sessions to others and promote them through Learn.
- Determine method and process for evaluating professional development sessions promoted through eXtension Learn and potentially those held by others.
- Make this the learning network for Cooperative Extension; i.e., the place to see what’s available for self-directed learning, and to connect learners to learners.
- Promote the creation of Professional Development Learning Communities around Extension core competencies. Encourage these PD Learning Communities to be actively supporting and providing learning opportunities.
- Focus on making this an opportunity to help in discovery of professional development for all of Cooperative Extension.
- Engage with institutional teams to promote Learn within their respective institutions as both participants in and contributors to Cooperative Extension learning opportunities.
- Modify eXtension Learn to include links to professional development courses.
- Conduct a national needs assessment to help design and develop professional development programs to help faculty and staff learn how to use eXtension to make their work better and easier.