Strategic Roadmap - Executive Summary

Introduction

Since its inception, eXtension has been in the forefront of strategically planning its future. This Executive Summary contains the essential strategy development material of eXtension's new "Strategic Roadmap." It represents eXtension's overall master plan for managing for success both for the long term (5-7 years) and short-term (1-3 years). Throughout 2008 eXtension's leaders, professional staff and contributors will further build out this master plan by completing its future organizational model and communicating and launching important new strategic directions. This Executive Summary briefly describes the process, findings, and action plans eXtension pursued in this effort. Further details will be found in other documents.

The Process

• In November 2007, the eXtension Governing Committee approved a strategic planning effort to create a new "master plan" to build eXtension's capabilities into the future.
• In December 2007, Russ Roberts, a management consultant and Adjunct Professor of Management and Organization, Kellogg School of Management, Northwestern University was hired to facilitate the planning effort to result in development of the new "master plan."
• Two surveys of Cooperative Extension directors, administrators, the eXtension leadership team, eXtension professional staff, subject matter experts outside CES, and other stakeholders, supplemented by interviews as well as both internal and external data on key societal trends helped to inform the process.
• Two strategic planning retreats were held with the first, involving key Extension leadership and eXtension leaders, focused on understanding the Cooperative Extension System’s (CES’) and eXtension’s current and future competitive and internal environments and the implications of these for eXtension’s future strategic direction. A second retreat for all eXtension staff 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

The timing of this strategic planning effort is important. eXtension recently launched its web site to high initial acclaim – a significant milestone event on the way to fulfilling its mission. The site stands as tangible proof that collaborative work is taking place and that eXtension is working; however, challenges remain as we seek to meet the needs of various Communities of Interest. The context within which eXtension operates is complex and presents both opportunities and challenges for success. These include:

• Developing Quality Content: Quality content has been the hallmark of Cooperative Extension and must continue to be so, especially in a competitive information and knowledge environment.
• **Attaining Visibility, Richness and Loyalty:** We cannot take for granted that our existing Extension customers will readily move to eXtension and we must assume that new customers will need to find, experience, and remain with us.

• **Aligning the Technology Platform:** Technologies change daily and consumers today readily change as quickly. eXtension must be nimble and constantly monitor and modify.

• **Securing Long Term Sponsors:** We cannot rely on assessments and federal funding alone to sustain eXtension. We must advance a broader view and strategy without compromising content integrity.

• **Building Broad Support:** Half of our current Cooperative Extension workforce has connected in some way to eXtension; however, we need broader support and engagement.

• **Scalability:** Knowing that eXtension has made significant progress since its creation three years ago, people are anxious to see it scale more rapidly while doing so in a cost-effective manner.

• **Relevance and Value:** Content needs to be relevant and applicable to the sometimes significantly different needs and specific conditions of individual states or regions of the country.

• **Content Development & Collaboration:** Some fear remains that a collaborative, wiki-based, content development approach may not adequately protect Cooperative Extension’s superior fact-based, peer-reviewed research and information when collaborating with non-faculty community participants, even when collaborators are Cooperative Extension employees or Community of Practice partners.

• **Personalized Delivery:** eXtension must address changing demographics and existing and potential customer needs in a personalized manner.

• **Truly Complementing Cooperative Extension:** eXtension should be a vital and essential complement to the traditional brick and mortar local Extension office and can broaden the reach of Cooperative Extension, attract new customers, drive up the value received and drive down the cost per customer served.

• **The Changing Roles in Cooperative Extension:** Those less taken with the potential payoff of eXtension either have not been introduced to the potential benefits, find them less likely to be achieved, or value them less. Some believe that many or most Extension customer needs require uniquely local solutions in spite of the fact that people are increasingly seeking Internet-based answers to their questions.

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**Our Strategic Intent**

Perhaps the most visible and most often used 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 revised these important descriptors. In addition, it has further developed and defined even greater descriptors of its strategic intent.

• **Competitive Advantage**--Our competitive advantage will draw upon these foundational strengths; eXtension is:
  o *Customer-Focused*
  o *A Trusted Resource*
  o *Community-Based*
  o *Guaranteed Access*

• **Commitment to Success**--eXtension, in its commitment to meet the needs of online customers, will ensure the greatest possible success of the entire Cooperative Extension System by:
  o *Building the Cooperative Extension Service Network*
  o *Producing Effective Content*
  o *Increasing Visibility*
  o *Increasing Local Use and Value*
Reaching More Customers

• **A Return on Investment**—Our intent is to present a significant return on investment to our partners and supporters thus justifying their continuing faith and support of eXtension. As we continue to mature, we will work hard to:
  o **Demonstrate Our Value**
  o **Strengthen Content Development**
  o **Grow and Diversify Our Funding**

• **Our Promise**—We pledge to help make all of Cooperative Extension – for we are all members of the same organization with the same goals and values – a more vital, responsive, and viable entity for decades to come while assisting our customers with the needs we were created to serve.

### Action Plans

The Action Plans that follow were identified through both the Strategic Planning and Strategic Implementation retreats to have the highest priority at this time. They will be supplemented with actual timelines and milestones upon which eXtension can act, react, and build over the coming years and months.

#### Action Plan for Improving Services to Our Customers

**Situation**

As eXtension moves forward to actively compete in today's knowledge marketplace, involving customers and clients of the Cooperative Extension System and those who have yet to discover eXtension becomes even more important. We need to better understand the programs and content they are interested in, how they benefit, how and where they prefer to engage with CoPs and other learners, and in what formats.

**Recommendations**

• Develop strategies to improve understanding of customer needs. Build upon known needs analysis efforts currently underway.
• Encourage CoPs to engage with customers to form interactive "Communities of Scholarship", content-related communities applying social media. We need to be more proactive in discovering and engaging communities in locations of their own choosing.
• Create additional entry points to the eXtension system. Examples include local web sites, mobile platforms, SMS (i.e., Short Message Service), and virtual worlds. Make our content more discoverable through search engine optimization to help drive traffic to our resources.
• Improve current tools and services by making them easier to use, better integrated and able to serve content in various formats. Define additional information and educational products that can be created with eXtension content and that add value at the local level.

#### Action Plan for Empowering CES Employees

**Situation**

Until eXtension is widely used and accepted as a normal way of doing business for Cooperative Extension system-wide, the danger exists that eXtension will be viewed as an "add on" to employees' job responsibilities. Many in Cooperative Extension still need to have better examples, actual impact data and more success stories from their own faculty and staff as to the direct benefits of eXtension
before they are willing to publicly state to their employees "eXtension is part of your job and you will be evaluated based upon your use and contributions to eXtension."

**Recommendations**

- Develop and implement Phase II of Be, Grow, Create an internally focused marketing campaign to inform and increase participation in eXtension.
- Provide professional development training addressing eXtension-related technologies, services and societal trends.
- Work with directors and administrators to incorporate eXtension contributions of faculty and staff into merit evaluation criteria and promotion and tenure processes.
- Communicate the eXtension Story.

**Action Plan for Transparency and Accountability**

**Situation**
eXtension has a set of goals and performance metrics, which need to be routinely reviewed and endorsed to make sure they measure eXtension’s success. Continued evaluation assistance needs to be provided to CoPs in measuring outcomes/impacts of their material. In addition, effort needs to be expended in documenting how eXtension enhances the Cooperative Extension System.

**Recommendations**

- Routinely review, revise and enhance eXtension’s metrics.
- Continue to work with CoP evaluation contacts and evaluation sub-committees on evaluating and reporting the use of, and outcomes and impacts of their informational and educational materials.
- Create a central location to house all appropriate content and process information for easy access by CoP members and other Extension personnel.
- Investigate and begin developing a system for collecting eXtension process and impact data.
- A major multi-year study will begin in 2008 to determine how eXtension is enhancing and impacting the Cooperative Extension System.

**Action Plan for Adding and Supporting Existing Communities of Practice**

**Situation**
eXtension needs to strategically expand the number of content areas offered to the public. However, there are several major limiting factors including available budgets and eXtension resources. With flat budgets, adding more CoPs means fewer dollars available per CoP.

**Recommendations**

- Simplify the CoP formation process making it less expensive in terms of time and money.
- Continue with a call for CoPs by application without eXtension start-up funds. This method of formation allows inclusiveness of a wide array of content topics and allows highly motivated groups with niche content areas.
- Continue the process for the "State Needs-Based Model" to identify content areas that are regional Extension priorities. This will be a 2008 strategy.
- Develop another model for initiating and supporting emerging Communities of Practice using feedback collected from local agents, educators and the public. Explore forming CoPs based
initially on FAQs and Ask the Expert alone, to see if CoPs can be formed more quickly and at less expense.

- Establish and support internal CoPs to address learning priorities grounded in core competencies as identified by CES leadership.
- Implement "best practices" in content development to speed up publishing processes.
- Support existing "certified" Communities of Practice by providing annual leadership funding to improve on-going activities and to update interactive and engaging educational materials.

**Action Plan for Content Development and Support**

**Situation**
A usability study of the Community of Practice (CoP) Wiki revealed that CoPs generally appreciate the collaborative processes MediaWiki offers. But there are concerns about ease of creating content, navigation, uploading files, use of graphics, and location of content once created. Users seek an intuitive, less technical, less intimidating, and less difficult system.

**Recommendations**
- Content development options need to be developed and implemented to support eXtension publishing of content that ensures content discoverability by search engines.
- eXtension will specify policy and protocol (i.e., Atom feed) for accepting peer-reviewed, ready-to-publish content from any content management system used by a Community of Practice.
- eXtension will define requirements for selecting and implementing a new content development tool(s).

**Action Plan for Increasing Funding and Partnerships**

**Situation**
eXtension launched in February 2008 with 16 published Communities of Practice (CoPs). By the close of 2008, as many as 38 CoPs will be in some stage of development. While this is an excellent start, it represents only a portion of the content and services the public is interested in, as well as what directors and administrators envisioned when they established the initiative. Therefore, eXtension needs additional funding to add more CoPs, maintain and improve current ones and to accelerate their growth and development.

To take eXtension to the next level, moving from 38 to perhaps as many as 175 highly functional CoPs that engage and interact with Communities of Interest, additional resources must be secured. To have CoPs form faster with engaging and interactive content, more funds are needed per CoP than have been supplied by the start-up funds to date. The following budgets describe the costs associated with starting new and sustaining existing CoPs, while representing how we transition from first to second generation CoPs. Second generation content development moves content into a highly produced on-line product that is both engaging and interactive.

**Community of Practice Start-up Budget**
This budget is designed to cover costs from the “start-up period” to public launch of a CoP.

- Direct support to the Community of Practice: $247,500
- Infrastructure Support: $ 65,000
- Contributions by Faculty and Institutions (on average): $ 82,500
- **Overall Total Cost for CoP Startup:** $395,000
Community of Practice Annual Enhancement and Sustainability Budget

Once a CoP has formed and created content for public launch it is expected that each CoP will continue to develop and add additional content. While some budget aspects increase in scope other needs decrease.

- Direct support to the Community of Practice: $183,000
- Infrastructure Support: $65,000
- Contributions by Faculty and Institutions (on average): $78,000
- Overall Total Cost for CoP Sustainability: $326,000

Future Budget Needs

Based upon the costs described above, approximately $300,000 is needed to start-up a new Community of Practice. To sustain a CoP the cost is approximately $250,000 annually. This includes both the direct support and infrastructure support. Over the next five years eXtension could grow to include as many as 175 Communities of Practice. Given these costs, the following table represents the funding needed to fully support Cooperative Extension's intent to meet customer needs through eXtension in a way that will appeal to new 21st century customers.

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<td>$45.25M</td>
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No. of New CoPs | 25 | 25 | 25 | 30 |
| No. of Existing CoPs | 40 | 65 | 90 | 115 |
| Total No. of CoPs | 65 | 90 | 115 | 145 |

Note: These estimated numbers of new CoPs are based upon the current model of Communities of Practice. Should the model for developing them and/or related nomenclature change, the number and amount needed to support them would change, accordingly.

Recommendations

To develop the funding needed to grow eXtension over the next five years, an aggressive blend of ongoing efforts, as well as new ones will need to be done.

- Funding
  - Inform and seek support for the budget plan from directors and administrators.
  - Consider new models of support to protect eXtension's ability to generate new CoPs.
o Establish and launch a new funding plan to increase financial support of eXtension considering all available sources of revenue generation.

* Federal Government
  o The eXtension Finance Task Force will work to increase federal investment in eXtension.
  o Integrate eXtension into CSREES agency grant programs and/or create new mechanisms for grants specifically geared to eXtension.
  o Develop procedures and policies to establish content partnerships, links, and collaboration.
  o Look for new ways to develop new partners in content creation through a content partnership plan.
  o Implement a work plan to solicit resources from other federal potential partners and agencies (e.g., USDA, Department of Energy, Department of Justice, etc.).

* Institutional Support
  o Encourage state directors and administrators to continue their assessments while working to increase USDA-related funding. It’s possible that, as new funding from other sources come to eXtension, institutional support might take new forms including increased in-kind support that might evolve into an institution, for example, buying out the time of CoP leaders. Such support could eventually serve to offset assessments.

* Commercial (private)
  o Consider hiring a commercial vendor to assist with corporate development (e.g., web sponsorships, advertising).
  o Prioritize the list of current and prospective CoP content areas based on their ability to attract commercial support.
  o More actively engage CoPs and other key Extension personnel in fundraising activities (e.g., develop champions within CoPs to assist with development activity).
  o Provide useful metrics to sponsors that demonstrate visitor impacts.
  o Develop guidelines for allowing potential sponsors to participate in CoPs and to benefit from publicizing events and adding news for a fee.
  o Develop templates/tools needed to encourage sponsors to support CoPs.
  o CoPs will tailor and implement a funding plan targeting sponsorships.
  o Develop/distribute fee-based educational programs.

* Memberships
  o Develop a strategy/process for non-land grant institutions and/or international university partners to join or affiliate with eXtension.

* Other
  o Involve the development committee in fundraising strategy development and execution.
  o Explore ways for CoPs to become self-funded through the sale of services and products.
  o Establish e-commerce services for eXtension.
  o Determine the cost effectiveness and value of eXtension to and communicate results to stakeholders (e.g., directors, administrators, faculty, staff, etc.).

**Conclusion**

This Executive Summary is merely a snapshot into the entire process and ultimate strategic roadmap. Other documents will provide more depth and explanation of these outcomes. eXtension has been built, tested, and launched. And, it works. We continue to reinforce eXtension’s role within Cooperative Extension in meeting the needs of a new generation of customers while addressing the ongoing concerns and issues traditional customers face every day; a critical role eXtension can play in Cooperative Extension’s future.

July 28, 2008