

## Title:

Engaged Program Planning for eXtension Impact Collaborative Teams

## Abstract:

The eXtension Impact Collaborative provides teams with tools to develop innovative, community based, approaches to problem solving. The following explores recommendations to increase community engagement during the program planning process for Impact Collaborative teams. These approaches recognize shared learning and shared expertise and emphasizes having community involved in all aspects of program development from needs assessment through evaluation.

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## Introduction

eXtension's Impact Collaborative is a methodology that helps Cooperative Extension projects, programs, and initiatives to be innovative and community engaged efforts that result in measurable and visible local impact. Whether your team is looking to improve an existing program or expand its reach to new audiences, possibly through the use of new technologies, or seeks to establish of new services or spark the creation of new businesses, the Impact Collaborative process, engagements, and activities provide project teams with tools to develop innovative, community based, approaches to problem solving. The following aims to provide context and guidance on community engagement and team building in the Impact Collaborative practice.

When identifying a need or challenge and the potential for a new program, initiative, service or project to impact that challenge, Cooperative Extension Service (CES) program planners and project developers may find it useful to ask three questions. They originate with Ron Lippitt, one of the founders and thought leaders for the field of organization development, who intuitively asked them in designing a collaborative change experience (Cady 2007).

1. What is the purpose?
2. Who needs to be involved?
3. What conversations need to take place?

1. The first question is aimed at the WHY? of your project, program, or initiative: Why are you trying to address this challenge? How do you define the problem? People frequently confuse problems and symptoms. So spend some time clearly defining the problem to be solved - the purpose of the project.

2. Answering the second question will ensure that you have identified all necessary stakeholders: Who needs to be on your team? What process and content expertise do you need? Whose time, talent, treasure, and ties are you needing to connect to and leverage to implement your project?

3. Once you have some clarity of purpose and your core stakeholders, the focus shifts to the nature of the process – how to have productive and meaningful conversations that move the group towards the future it yearns for. This third question seeks to identify what facilitation you may need to provide ongoing communication and assessment as those involved define the problem, design and develop solutions and coordinate the implementation of those solutions. How are we going to go about solving the problem or achieving our purpose?

## 1. The eXtension Impact Collaborative Roadmap

The core purpose of the eXtension Impact Collaborative practice, for each Project Team going through the process and engagements, is to create measurable tangible impact[s] in its respective community [county, city, region] or university. To describe the process progression toward that impact, the Impact Collaborative methodology leverages a roadmap instrument, [The Impact Collaborative Project Roadmap](#) [a template is linked [here](#)] that allows participant teams to lay out and visualize its work through defining roles and responsibilities within each Project team.

The Impact Collaborative Roadmap design supports CES professionals in the role of facilitator and learning collaborator and seeks to leverage the wisdom of the community in implementing an impactful project, program, or initiative. Its structure is organized by combining the P.L.A.N. framework [Purpose, Leaders & Stakeholders, Actions, Needs] with a focus on how leaders and stakeholders drive action by identifying those Responsible, those Accountable, those needing to be Consulted with and Informed as well as those Facilitating the process [RACI+F]. This brings the focus to Extension professionals being the facilitators of the change, facilitators of project incubation, iteration, and implementation. The roadmap enables the structuring of the diverse expertise needed to inform, implement, and iterate the project.

The Impact Collaborative Roadmap, therefore, allows a refocused consideration of the needed expertise that moves each individual project forward. This includes subject matter experts and key informants on aspects of implementation, accessible to the participant teams through eXtension Impact Collaborative Engagements like the Innovation Kit workshops and Impact Collaborative Summit. It also seeks to engage community leaders with expertise and access to local channels and networks for implementation, as well as funding and resource partners, both locally, as well as those national or regional partners leveraged during eXtension Impact Collaborative events.

## 2. Engagement in Cooperative Extension

Through interviews with 35 Extension educators in two state Extension organizations, Vines (2018) identified the following as reasons educators prefer to use engaged models of program delivery. They are increased local program support, increased administrative support, increased achievement of medium and long term outcomes, stronger relationships, and support for the future of Extension. The study also developed definitions that can be used to define the engaged and expert models of program delivery for Cooperative Extension.

### 2.1. Engaged Model

Definition: The engaged model of program delivery in Cooperative Extension is characterized by community involvement in all aspects of program development, sharing in the identification of issues to be addressed, developing a process for implementation and development of knowledge, evaluation and securing funding. Expertise and learning processes are shared. In the engaged model, Extension serves as a conduit between the community and the university. The engaged model is based on relationships with the

community developed through continual interaction, partnerships and collaborations. Relationships and learning extend beyond traditional program boundaries. Learning experiences involving an engaged model are robust and rich, as the community works in both formal and informal settings to identify problems and develop solutions (Vines, 2018, Results and Conclusions para 1).

The conceptual framework for this model (Vines, 2018) is based on the use of collective impact (Kania & Kramer, 2011) for community involvement in identifying problems and working towards solutions. In addition, this model relies on the concepts of shared learning and shared expertise as well as ongoing two-way communication consistent with faculty serving in the role of action researcher, public scholar, and educational organizer as defined by Peters, Alter, & Schwartzbach (2010). Finally, the educational approaches associated with this role are those of facilitation and transformative education (Franz & Townson, 2008).

## 2.2. Expert Model

Definition: The expert model of program delivery in Cooperative Extension emphasizes a one-way flow of information, although interaction with clientele exists in the form of discussion, questions and feedback. The university, through Extension, serves as the expert. In this role, Extension provides guidance and information and responds to questions. Expertise provided by the university is research-based, and the providers of expertise are carefully vetted representatives of the university. The community may be involved in the identification of program needs. Program planning, implementation and evaluation are internal activities of Extension. Other terms used to refer to this model are outreach, a bucket-filler approach, and top-down programming (Vines, 2018, Results and Conclusions, para 1).

The conceptual framework developed for this model (Vines, 2018) is based on the diffusion of innovations (Rogers, 1995). The faculty role which connects most closely with the expert model is that of the service intellectual (Peters, Alter, & Schwartzbach). The educational approaches consistent with this work are service and content transmission (Franz & Townson, 2008).

In Extension organizations, there is often a mix of engaged and expert program delivery models occurring simultaneously which is referred to as a hybrid model. Through my study, the hybrid model of program delivery was also defined as follows. This model seems very appropriate for the work of a modern Extension system where faculty use different forms of expertise and educational approaches depending on the situation being addressed. A definition of the hybrid model was developed based on the data collected through the surveys with the agents. It is as follows:

## 2.3. Hybrid Model

Definition: The hybrid model of program delivery in Cooperative Extension is used to involve clientele in the delivery of programming that meets local needs. The model emphasizes shared expertise that comes from the university, stakeholder organizations, and individual

stakeholders. Stakeholders are also considered to be partners. Partners are involved in multiple aspects of programming, and their role may vary based on location. There is emphasis on continual interaction between Extension and the community throughout the programming process. In this model, the university provides state interest teams, data on trends and research while the local community is responsible for application. The community is defined by interest rather than geography. In this model, an expert approach may be used initially to increase community awareness in a subsequent, more engaged programming approach (Vines, 2018, Results and Conclusions, para 2).

### 3. Using an Engaged/Hybrid Model

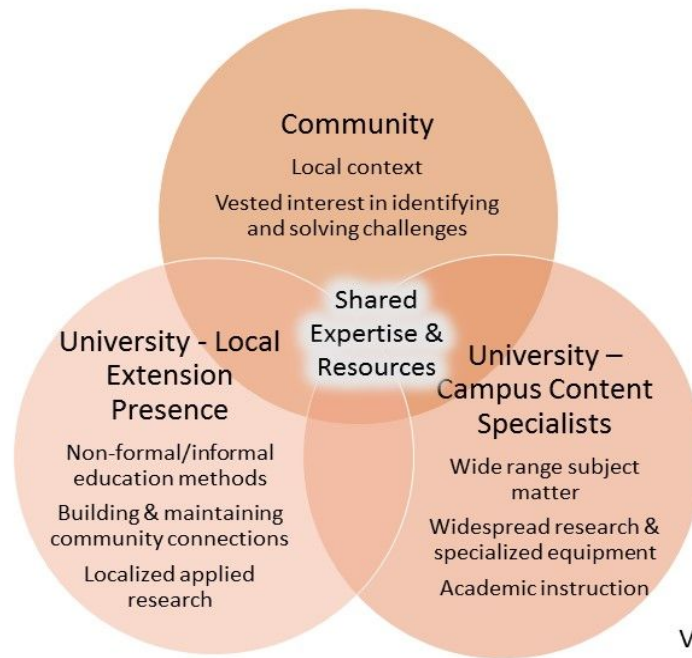
An engaged approach to program delivery can be used to achieve the following:

- To achieve better learning outcomes
- To build and strengthen relationships
- To develop and improve program support
- To provide solutions that are more sustainable (Vines, 2018).

When looking at greater engagement, it is important to consider how community is defined. For internal organizational change initiatives, 'community' would be the system, organization, or institution looking to be impacted. A community may also be defined in terms of geography, an industry or a virtual space. You may consider an interest-based community (your topic) within a specific geographic region (county, region, or state). The processes described in this paper can benefit various types of change initiatives in many types of communities.

### 4. Shared Expertise, Shared Learning

The engaged approach of program delivery emphasizes both shared learning and shared expertise. If you are sharing expertise you are not expected to give up your expertise, but to recognize that there are other sources of expertise. For instance, as a county educator your overarching expertise that you bring to multiple communities may be your ability to bring people together and facilitate tough discussions. Or if you are working in an area related to your field of study, your expertise may be more discipline-related. Similarly, other members of your community have expertise they contribute. In an engaged model we respect these multiple sources of expertise and provide an environment where people contribute based on their specific understanding. So, as in the example of multiple sources of expertise of the agent, a community member may have subject matter expertise in addition to providing expertise related to the local context of the community. In addition, because of Extension's connection to the land grant system, there are sources of content expertise that can be accessed as needed to contribute to developing community solutions that would otherwise be inaccessible to those communities.



Often in Cooperative Extension we have considered our content expertise to be our primary value that we bring to communities. However, we also bring value that is perhaps even more critical in today's society in our ability to bring people together for meaningful dialogue that leads to positive outcomes to the complex situations facing our communities. Merrill Ewert, retired Cornell Extension Director, identified the contributions we make in Cooperative Extension that are process oriented as being those associated with the educational approaches of facilitation and transformative education (Franz & Townson, 2008). He identified the content oriented contributions as service and content transmission. The high process approaches are most consistent with an engaged model of program delivery (Vines, 2018) and are the areas in which Cooperative Extension is most likely one, if not the only, contributor in this area in many communities.

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**Action Item 1:** Take five minutes to identify and write down the expertise that you provide to your team. Then, as a team, share and compile a list of expertise that is represented. Now, as a team, identify other expertise that will be needed/ useful in resolving the problem you are trying to solve? Finally, devise a plan to identify who has the missing expertise and who in the existing team will contact the additional team members to invite them to be a part of the team.

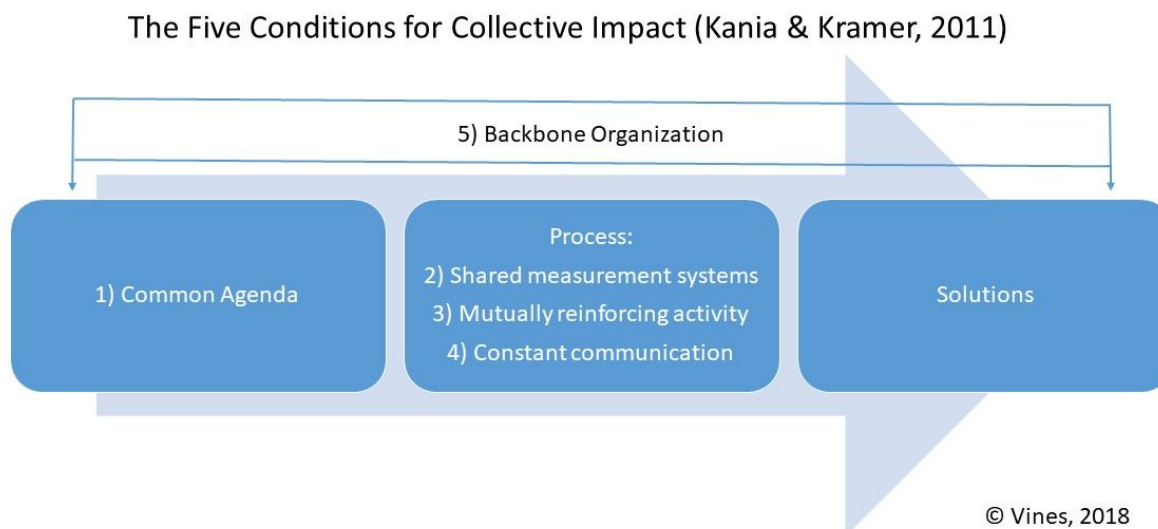
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## 5. Use of Collective Impact

Collective impact as described by Kania and Kramer (2011) has been suggested as a theoretical approach to be used by Cooperative Extension (Niewolny & Archibald, 2015) in engaged practice (Vines, 2018). In this section, we describe the elements of Collective Impact and relate them to logic models and the eXtension Impact Collaborative Project Road Map.

To achieve success using collective impact, Kania and Kramer (2011, The Five Conditions of Collective Success section, para1) identify five conditions which must be provided:

- 1) A common agenda
- 2) Shared measurement systems
- 3) Mutually reinforcing activities
- 4) Continuous communication
- 5) Backbone support organizations



Let's explore each of these conditions further.

### **5.1. A common agenda**

Prior to participation in the eXtension Impact Collaborative Innovation Kit Workshop or Designathon One, your team identified a topic you plan to address. During this first Impact Collaborative Engagement, the team works to further define and prioritize the specific problem associated with this issue you plan to try to address. Now you need to define a common agenda. You are probably working on a very complex issue that is made up of multiple problems. Depending on the size and expertise represented on your team, you may want to work as one large team or break into subteams. If this is the case, you will want to define the common agenda for the large team first and then let each of the subteams repeat the process for their specific piece of the issue they are working to address. Your teams shared agenda will be the complex issue you are trying to solve. The eXtension Impact Collaborative Roadmap offers one avenue to organizing these sub-teams and their purpose and agenda.

For instance, maybe we are working on the opioid epidemic as an issue. And maybe as a team we determine that our first priority is to prevent youth from ever having access to opioids. As a group we may identify several ways in which youth gain access to opioids which we want to prevent. We may choose one of these, or if we have a large team, we may break into sub teams with each focusing on a different path. However, our common agenda is to prevent youth from gaining access to opioids.

If we were thinking about this from a logic model perspective, the common agenda will relate to the outcomes you are hoping to achieve related to the issue you identified previously. In the context of the Impact Collaborative Project Roadmap this aligns with the first question posed - the effort of defining purpose and outcomes for the project and determining clear deliverables at each phase of the project journey.

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**Action Item 2:** As a team develop a purpose statement that specifies what it is that your team plans to work on and change. If you have subteams, let them repeat this process. [In the Impact Collaborative Innovation Kit, one example is the Zen Statement your team creates in Level 3.]

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### 5.2. Shared measurement systems

As a team, and possibly within individual subteams if your team has gone this route, you need to determine how you will measure success. What types of data are you going to use to determine if you are making a difference? How will you access that data? Who will access the data and when? Your team will need to identify the specific measures they need to watch as they work towards progress for their common agenda.

From a logic model perspective, as well as in the context of the Impact Collaborative Project Roadmap, the shared measurement systems are what you identify as evaluation measures. However it is important that evaluation be an ongoing process and not just something that occurs at the end of the project which often happens in our traditional programming using logic models. In addition, all members need to be involved in this constant evaluation. The questions identified above should help to provide an environment of ongoing evaluation.

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**Action Item 3:** How will the team measure success? What data already exists? What data will you need to collect? How will you access the data? Who will access the data? How frequently will you check progress?

Part of issue being measured	Data to be used?	Who will monitor data?	How frequently will the team check progress?

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### 5.3. Mutually reinforcing activities

How will your team and sub-teams achieve their work? Part of the definition of the engaged model of program delivery emphasizes that programming in an engaged model is ongoing and that methods emphasize active learning. The emphasis on active learning may mean rethinking how you deliver educational content.



As a team you will want to think about the best method to achieve what needs to be accomplished related to the work that is being undertaken. For both the Impact Collaborative Project Roadmap, as well as in terms of a logic model, these items relate to the activities and engagements associated with a program. These may include workshops, providing curriculum online, in face-to-face settings, in places where target audiences will interact with it best, development of new services, and a host of tools that can be used to increase getting information and services to audiences where they can use it most effectively. Other means may be mentoring programs, providing opportunities for people to practice what they have learned, etc. New technologies, including customized smartphone apps, provide opportunities that were not available five years ago.

In Extension, we often classify goals based on short, medium and long term outcomes. Radhakrishna, Olson & Chaudhary (2017) developed a model for linking desired outcomes to educational delivery methods. These methods are linked to the educational models developed by Bloom, Dale, and Bennett. This may be a useful tool in considering how you will move audiences from short (knowledge, awareness, skills, attitudes & aspirations) to medium (behavior change) outcomes.

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**Action Item 4:** How will your team/sub-teams work with the target audience to achieve the desired outcomes? Develop a chart and indicate the desired outcome, the target audience, and the method that will be used to achieve the outcome. Then think about who will be involved from the team in developing and delivering the methods that are used.

Desired outcome	Target audience	Method to be used to achieve the outcome	Who needs to be involved?

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#### 5.4. Use of continuous communication

Communication often makes or breaks the success of a group in achieving goals. First, as a team you must determine what is the most effective and efficient manner for you to communicate as a team on an ongoing basis. Develop a plan and stick with it. With today's technology and dispersed teams, interactions in an online environment are common. This may mean regular team check-ins are conducted using an online platform that allows members to interact in real time. Or it may mean that the team works virtually to develop documents and products of its work through online platforms that allow each member to contribute on their own schedule. Either way, the team needs to decide what tools will be used, how frequently the team will meet and how, and what expectations are for progress between meetings.

The Southern Region Development Center (SRDC) recently sponsored a project to develop training for virtual teams <http://srdc.msstate.edu/virtualteams/index.html>. Your team may want to participate in the training as a group as you determine your expectations for virtual collaboration.

Regardless of whether an initiative's framework uses a project roadmap, a logic model, or other tools, the team needs a way to keep track of its progress. The old-fashioned approach of keeping meeting minutes that are shared by the group is still effective in reducing repetitive discussions and keeping teams moving forward. However, there are new tools for collecting this information and sharing it with the team. But the team needs to buy-in to the process used for doing this, so this should be a team discussion.

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**Action Item 5:** Develop a communication plan for your team. What messages need to be disseminated to achieve your desired outcomes? Who is the intended audience for each? What method will you use to reach the audience? How will you determine whether or not the communication was successful? Who will provide the communication?

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### 5.5. Backbone support organizations

One of the barriers or challenges associated with engaged programming process is the the sense that no one is in charge of making sure things are done as intended and on the schedule the team developed. Backbone support organizations, such as Cooperative Extension, contribute professional staff working on issues that can serve in a role to facilitate the progress of the team and connect the team to the resources of the organization. In the case of Cooperative Extension, the organization is extensive, providing access to a wide range of expertise which exists in our land grant universities. eXtension's Impact Collaborative aims to leverage this rich mix of resources and expertise toward the targeted impacts of each Impact Collaborative project teams.

Another challenge can occur when there are multiple organizations that support an activity, but they work ad hoc and are not clear on the team expectations. There are also times when organizations working in the same space may see each other as competitors rather than collaborators. In order to be most effective, the team should identify backbone support organizations and work with them to determine the type of support they will provide. The clearer roles and expectations can be defined, the better. The Impact Collaborative Project Roadmap provides one such structuring opportunity in the way teams are organized.

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**Action Item 6:** Identify backbone support organizations and work with them to define roles and expectations the team has of them as well as the expectations they have of the team.

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## 6. Impact Collaborative Project Team Structures

As your program, project, or initiative grows – the complexities of implementation, communication and organization of the work are also likely outgrowing the bandwidth and capacity of the initial seed team for your effort. In order to formalize and organize your team and sub-teams, we suggest the following team structure for your Impact Collaborative project.

### 6.1. From Seed Team to Steering Team

The initial seed team, that began iterating the idea that started your Impact Collaborative Project will at one point need to start delegating responsibilities to committees and sub-teams. At that point, the seed team's role shifts to that of a steering team that is responsible for the coordination of the project and typically becomes the full time project management & consulting team for the Impact Collaborative Project. It usually meets weekly.

- Sanctioned by the leadership team [see below],
- Ensures the delivery of the outputs and the attainment of outcomes,
- Charged with ensuring that the project and subprojects (in each work stream) are coordinated and working efficiently together.

### 6.2. Leadership Team

The Leadership Team are those with final decision making power and financial sign-off authority, but not involved in the day-to-day of the project. For CES-focused projects and programs this team is often comprised of or includes administrative leaders from the University. Depending on the context of the initiative, a pre-existing team of university administrators may already represent this role and responsibility. This group of managers and senior project leaders typically meets monthly and;

- makes important governance decisions,
- leads and coordinates strategy development
- ensures the project plan is aligned with the institutional goals and strategy,
- provides support as [project champions](#) (Pinto & Slevin, 1989).

### 6.3. Work Streams/Work Stream Teams

These are teams, sometimes individuals [depending on the scope of the project], responsible for the work/ sub-projects. Each team has a specific area of responsibility. These are the groups that need to proactively ensure all the internal and external functions are complementing the project. Each is represented by their own stream/row in the Impact Collaborative [Project Roadmap](#). Depending on the project, work streams may vary to include strategy, structure/ operations, governance, fundraising, evaluation, communications, and other streams.

### 6.4. Change Network

As the project itself is broken down into work stream teams, each Work Stream Team has a leader serving as a member of the Change Network Team. The change network team is the vital link between the overall project and the specific areas of work and information required to complete the specific tasks. This team ensures that each of the sub-projects (work streams) are connected as a whole project.

## 6.5. Design Teams

Design teams are time-limited sub-teams, beyond traditional 'committees,' convened as needed, for a specific outcome, to craft and support, for example, educational events that deliver on your outcomes. These outcomes may vary from an event to a series of engagements, or specific products or outputs identified as part of a bigger initiative or project. Design Teams are intentionally set up as a maximum possible representations of the stakeholders that will be participating in that event/ activity/ subproject, or using the product. Through the process, the design team should model the collaborative approach to planning and design intended to result in co-ownership of purpose and outcomes. Design Teams can also often be the starting point of a new project, program or initiative.

The Design team establishes a [PLAN](http://bit.ly/ICPLAN) (<http://bit.ly/ICPLAN>) for the given engagement/event/service to be designed that is purpose-driven first and identifies:

- Purpose & Outcomes - the outputs/products of the event
- Leaders/ Participants/ Stakeholders/ Partners [RACI+F]
- Actions, Activities, and Agenda of an event, as well as the
- Needs - from financial to attitudes to technology, etc.

## Conclusion

We seek to provide procedural supports for eXtension Impact Collaborative project teams looking to implement more engaged methods in their projects. The hybrid model, with its flexibility in movement from expert to engaged models of program delivery provides an overall framework for these ways of working in Extension. The specific tools of Collective Impact and the Impact Collaborative Project Road Map are useful ways to engage community in this project work. These engaged approaches recognize shared learning and shared expertise and emphasize having community involved in all aspects of program development – from needs assessment through evaluation – to increase community ownership. Shared expertise does not mean giving up expertise, but recognizing other sources of expertise and forms of expertise beyond content knowledge.

## Acknowledgements:

Karen Vines (<https://www.alce.vt.edu/about/faculty-staff/vines/vines-bio.html>) is an assistant professor and Extension specialist for continuing professional education in the Virginia Tech Department of Agricultural, Leadership, and Community Development and Virginia Cooperative Extension. She is the eXtension/National Association for Extension Professional Staff Development (NAEPSDP) Program Planning Fellow for 2018. Karen's research focuses on engagement in Cooperative Extension and Higher Education and how to provide development for Extension professionals in this area. Karen can be reached at [kvines@vt.edu](mailto:kvines@vt.edu).

Karen's focus on engaged program development has added greatly to the Impact Collaborative. In this project, Karen has partnered with C. Theodor Stiegler of Nexus4change to connect her work on Extension delivery models and their implications for engaged program development with the work of the eXtension Impact Collaborative process. Molly Immendorf, eXtension, has overseen the development of the Impact Collaborative.

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