



Extension

UNIVERSITY OF WISCONSIN-MADISON

Extension Strategic Planning Progress report for External partners

May 2023

Dear Extension Partner,

In May 2023, the Division of Extension's strategic planning team completed its work understanding trends affecting Extension, engaging staff and external partners for feedback and perspectives, and identifying strategic issues facing the Division of Extension to more fully realize our vision. As you know, strategic planning is an iterative process, fueled by multiple levels of feedback and engagement, that helps an organization understand what issues are most critical to address in order for it to be successful in achieving its mission and vision. A strategic issue is a fundamental challenge that, if not addressed, has strong potential to impact our ability to fulfill our mission, fund our programming, and most importantly, serve the people of Wisconsin.

I'm providing this update to you to keep you informed and engaged in our process. I value your feedback, and it is my hope that we stay in touch as Extension continues our strategic planning and outlook to the future.

As a reminder, this process began in 2022, and included multiple context-setting exercises and steps, including collecting input and listening to many voices. Specific activities included:

- An assessment and data gathering of trends, strengths, and limitations affecting Extension
- Understanding barriers to our success
- Visioning exercise
- Strategic directions workshop

Specific internal and external engagement activities included:

- 11 small group workshops, engaging over 130 Extension staff members and producing a summary report of the themes that emerged from staff input
- Conversations with Extension Employee Resource Groups
- 55 conversations with county partners
- Conversations with 19 other partner organizations from across Wisconsin
- Conversations with other campus units (6 academic and 11 operational groups)
- Conversations with two Tribes and one tribal organization
- Two Board of Visitors meetings
- Opportunities for reflection on the summarized themes (over 65 additional colleague responses)

Using all of this internal and external feedback, the planning team identified several key/strategic issues facing Extension. These issues and their associated goals fall into 3 overarching themes which address the core Institutional Vision as well as Barriers and issues facing Extension. These are described below. Given the great deal of change that Extension has experienced over the past

6 years, these issues are not surprising. Neither are they insurmountable. The next steps of this process are to prioritize and stage these issues, identify specific strategies, and allocate resources to bring the strategies to life. Detailed next steps are found at the end of this progress report.

Strategic Issues:

Connecting People and Catalyzing Relationships

- **Strategic Goal: Authentically connect with communities & partners to develop a shared commitment to our work together** - The diversity and excellence of Extension programming are generally well-received by residents, audiences, and partners across the state. Through conversation with our staff, and further dialogue with our partners, there is noted appreciation of our educational work. The vision for Extension includes the continued desire to have a positive impact on communities across the state and make measurable differences in the lives of others. Recognizing an underlying concern to be “everything to everyone” that comes with this core work, however, is critical to navigate and manage the diversity of expectations now more so than ever.
- **Strategic Goal: Authentically connect with communities & partners to identify opportunities and priorities** - The Division of Extension strives to be a partner valued by all. Our programming makes a difference in the lives of those we are able to serve. Identifying our niche in the University by providing services to our current customers and to underserved audiences is an ideal raised by both staff and our partners. As we engaged our staff, our internal University partners, and our external constituents, we heard clearly that we are a complex organization and often we are not understood. University personnel and external partners do not know what services we do or could provide, and we are somewhat of a hidden gem. Partners appreciate our special skills; however, awareness of our complete portfolio and how we could facilitate more programming with a linkage to applied University research is not well known. The strategic nature of this issue comes in being able to do more with our current partners while assessing the best ways to expand to new audiences. Our traditional work provides a stable, trusted foundation upon which to build. Likewise, expanding into new areas, with new audiences, and around new topics, requires resources, particularly as competition comes from other providers and platforms.
- **Strategic Goal: Communicate the value of Extension** - Merging back with UW-Madison has created a variety of strengths and opportunities for Extension. Additionally, awareness of Extension and our work has long been challenging to communicate, share and explain without significant and deliberate resources. Internal staff and external partners agree that we continue to be a “hidden” resource. Extension desires to remain a partner that is trusted and sought after. Along with the set of change challenges we have faced, the world around us is changing with respect to the value, trust, and perception of higher education and science, governmental funding for educational services, and politicization of issues that Extension and UW-Madison have at their core. For these reasons, addressing our perception and building awareness of Extension’s work and impact is critical in order for us to be successful in our mission.

Supporting our People

- **Strategic Goal: Invest in career development & employee well-being** - The employees in the Division of Extension are exceptional in their knowledge, their training, and their passion for the mission of Extension. With these attributes in mind, the Division aspires to be an exceptional employer that fosters long-term retention of its staff by investing in their

development and offering opportunities for both skill improvement and career advancement. The recognition of “talent” in UW Extension staff was confirmed by our partners, as they noted a deep appreciation for their work, while also noting the challenge of employee retention in all market sectors. For Extension to become an employer of choice, a clear acknowledgment of how multiple changes have impacted the morale of the organization is critical, alongside the implementation of straightforward strategies to address the issues of development, advancement, and retention.

- **Strategic Goal: Create clear and mindful communications** - Over the past several years the Division of Extension has experienced an immense amount of change. First, we underwent a major reorganization, driven by a significant budget reduction with nEXT Gen (2015-2018). Secondly, in the midst of implementing nEXT Gen, Extension was moved to UW Madison in 2019 as its own Division within the University. Finally, we were faced with working through the COVID-19 pandemic from 2019-2022 where virtual work became a norm. The last 6-10 years have arguably been unprecedented in our history for both the amount of change and speed in which these events occurred. In many ways, this strategic issue is simply the backdrop in which Extension operates currently given the changes that have happened. Keeping the past in mind as we focus on communicating who we are, what we do, and the impact of our work is critical for Extension to be successful in creating a workplace environment that people want to work in, to maintain and build (or re-build) partnerships and relationships, and to successfully meet the needs of Wisconsin.
- **Strategic Goal: Develop a mutual understanding of policy** - In 2019, Extension returned to UW as a Division within the University of Wisconsin Madison. With this transition, Extension policy needs to fall within the umbrella of the University. Policy that had been developed independently by Extension over the past several decades now has to align with policies and procedures supported by our new home institution. In many cases, Extension benefits from the policy structure and environment provided by campus. However, specific challenges arose from the added requirements placed on Extension to align and comply with campus policies. Working together with UW, policy development needs to integrate the unique portfolio of Extension’s programming, in partnership with counties, tribes, state and federal agencies, and the citizens of the state.
- **Strategic Goal: Align operations systems to support Extension outreach goals** - Related to building our capacity to do our educational work, there arose a strategic issue around providing more support and coordination to sustain core operational units. Operations functions include, at a minimum, Human Resources; Financial Services; Educational Technology Support; Communications; Access, Inclusion and Compliance; and Administrative support. Many of these functions need to integrate within the established systems at UW Madison. Allocating enough resources to these functions, at a scale that provides efficient quality support service to the geographies and institutes is needed. Organization of these functions can occur in a centralized or dispersed format and likely will depend on the systems that need to be integrated to create and support efficiencies.

Fostering Growth

- **Strategic Goal: Build our capacity to do our work through funding, positions, & resources** - The Division of Extension has been funded with a base of state and federal (Smith-Lever) funds and also grants and revenue that fluctuate with their availability. One of the Dean’s pillars for Extension has been to expand our impact by diversifying funding. Throughout

the strategic planning, funding limitations have been identified as a challenge in meeting our vision. Specifically, concerns have been identified with our ability to provide programming services within the state and address operational needs, especially with increasing inflation. As indicated in other strategic issues, we are also facing the tension of providing funding for our traditional programs and audiences in lieu of expanding to new audiences. Partners we engaged during our process suggested that if we are successful in maintaining a strong base with traditional partners, this will also open up opportunities, through trusted partnerships, to expand to new audiences.

- **Strategic Goal: Invest in innovation and build structures to support & align cross-programmatic work & address emerging issues** - Within Extension and the University, our faculty and staff crave the opportunity to work with and benefit from experiences with their peers. We are an educational and applied research institution, and through collaboration and working together, we enhance our ability to apply those experiences to our programming. Creating opportunities to network and connect, however, comes with inherent challenges. Collaboration takes time and deliberate effort. While positive steps have been made to increase connections to campus, we found a general awareness and hope that connectedness with campus faculty, staff, and partners can be strengthened. Our physical presence in every corner of the state, as well as on campus gives us the unique ability to leverage partners to more fully realize the Wisconsin Idea. We have heard directly from external partners, including Tribal Nations, counties, municipalities, state and federal agencies, etc. to identify issues that need attention. Our ability to be nimble and be a part of the response, facilitate dialogue, bring relevant applied research to the topic, and leverage resources elsewhere in the state are some of the attributes in our toolbox.

Next Steps:

- This collection of issues will be presented to Extension's leadership with a request for approval to move forward on implementation.
- The issues will be prioritized and staged for most impact within the capacity and time constraints of staff.
- Implementation process and teams will be assembled to identify key steps and actions required, including assessing feasibility of draft ideas developed by the strategic planning team.
- As Extension is exploring implementation strategies, we will engage with partners and customers for feedback around specific strategies or approaches.

Throughout our strategic planning process, Extension's mission and commitment to serving the people of Wisconsin has remained steadfast.

We value the feedback and input you have provided to our process to date, and hope you will be open to continuing the strategic planning conversation with us. If you have any questions on the process, the issues we've identified, or next steps, don't hesitate to reach out to Catherine Neiswender, Assistant Dean and strategic planning team co-chair, catherine.neiswender@wisc.edu, or (920) 410-9650.

Regards,



Karl Martin
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UW-Madison Division of Extension