



TO: Extension Family, Friends and Stakeholders

FROM: Tony Nakazawa, Director

DATE: November 10, 2006

RE: *Extension Renewal: Compact Plan of the Cooperative Extension Service Fiscal Years 2007 through 2009*

A review of the 4-H program conducted in August 2006 and the subsequent report submitted in September ( [www.uaf.edu/ces/pdfs/4hreview.pdf](http://www.uaf.edu/ces/pdfs/4hreview.pdf) ) provide a window not only on 4-H but also on the Cooperative Extension Service. The attached document, *Extension Renewal: Compact Plan of the Cooperative Extension Service Fiscal Years 2007 -2009* ( [www.uaf.edu/ces](http://www.uaf.edu/ces) ), is a discussion of programmatic and fiscal issues facing Extension, and Extension administration's plans to address them. The three major issues covered in the draft compact plan are: 1) response to the 4-H review; 2) organizational restructuring; and 3) budget and funding. Each issue is described and discussed in terms of goals, actions, and status as well as schedule.

Your comments and feedback on this compact plan are requested during the 30-day review period, November 10 to December 11, 2006. **This deadline has been extended to January 12, 2007.**

Please direct your comments by 5:00 pm, **Friday, January 12, 2007** to:

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Thank you.

# Extension Renewal

## Compact Plan of the Cooperative Extension Service Fiscal Years 2007 through 2009

November 2006

*For review and comment – [extension@uaf.edu](mailto:extension@uaf.edu)  
30-day review period – November 10 through December 11, 2006*



# Extension Renewal

## Compact Plan of the Cooperative Extension Service

### Fiscal Years 2007 through 2009



#### EXECUTIVE SUMMARY

The review of the 4-H program conducted in August 2006 and the subsequent report submitted in September ( [www.uaf.edu/ces/pdfs/4hreview.pdf](http://www.uaf.edu/ces/pdfs/4hreview.pdf) ) provide a window not only on 4-H but also on the Cooperative Extension Service (Extension) as a whole. The report highlights that Extension offers excellent services and performs well with limited resources. The report also recognizes that Extension has untapped resources to increase its value and service to Alaska. Further, Extension has the potential to increase its support for the strategic goals of the University of Alaska Fairbanks (UAF), acknowledging that a number of interrelated organizational and structural issues must be addressed in order to realize this potential.

This compact plan is a three-year action plan that outlines the goals and the steps that Extension will take to make it a more responsive, efficient and effective organization. Below is a summary of the compact plan goals, actions steps and, in some cases, an update on the status of any initial activity that has occurred.

#### ISSUE 1: RESPONSE TO THE 4-H REVIEW

##### **1. Conduct a 4-H program management review and adopt standardized management materials.**

**Goal:** Develop and adopt standardized program management materials, policies and procedures to promote greater uniformity of standards across the State to support a more integrated statewide 4-H program.

**Action Step:** Contract with an external expert to assess Extension's existing program management materials, policies and procedures and provide templates of updated management materials, policies and procedures. (Begin Fall 2006; complete Spring 2007)

**Status:** A contract is in place with Susan Halbert, LLC, as of late October 2006, to conduct the management review.

**Action Step:** The contractor will assist Extension in promoting the adoption of the new management materials, policies and procedures. (Begin Fall 2006; complete Spring 2007)

##### **2. Hire a 4-H program leader.**

**Goal:** Hire a full-time 4-H program leader to provide administrative and programmatic leadership for 4-H staff, volunteers, and activities across Alaska.

**Action Step:** Name an interim 4-H program leader to begin addressing priority issues that impact the 4-H program. (Winter 2006/2007)

**Status:** Preliminary efforts have begun to identify the interim program leader.

**Action Step:** Hire a full-time 4-H program leader to provide administrative and programmatic leadership for the 4-H program. (Initiate recruitment process December 2006; hire program leader by July 1, 2007.)

**Status:** The initial development of the program leader job description has begun.

### **3. Develop a 4-H & Youth Development strategic plan.**

**Goal:** Provide focus and direction to the 4-H program so that it can integrate its activities with those of Extension, the CRCDC and UAF.

**Action Step:** Develop a 4-H strategic plan that is integrated with the strategic plans of Extension, the CRCDC, and UAF. (Begin Winter 2006/2007; complete Spring 2007)

### **4. Create UAF and Extension co-branding and identification with 4-H.**

**Goal:** Develop and implement a 4-H marketing and promotion effort that highlights the relationship of UAF, Extension and 4-H and provides guidelines regarding the use of institutional and 4-H logos.

**Action Step:** Create a team of UAF administrators and faculty to work with the 4-H program leader to promote improved integration of 4-H with the University, particularly the UAF Admissions Office. (Winter 2007)

**Status:** Extension has begun working with the UAF Admissions Office to coordinate student recruitment activities with Extension outreach activities.

**Action Step:** Create and apply uniform marketing and promotion policies and procedures, including the use of logos. (Begin Winter 2006/2007; complete Spring 2007)

**Action Step:** Audit all 4-H publications and brand with appropriate institutional and 4-H logos. (Complete Spring 2007)

**Action Step:** Create a single statewide 4-H newsletter as a mechanism to unify 4-H across the State, improve the quality of the 4-H newsletter as an informational and promotional tool, and use the newsletter to deliver relevant Extension and University messages. (Release first statewide newsletter Fall 2007.)

**Status:** The template of a statewide newsletter has been developed.

### **5. Integrate the slogan, *Making the Best Better*: 4-H statewide funding initiative (\$1.5 million).**

**Goal:** Extension will work with 4-H stakeholders across Alaska to generate funding to provide security for existing 4-H positions and to promote the expansion of 4-H to communities currently without 4-H programs.

**Action Step:** Extension will work with 4-H volunteers and stakeholders across Alaska to develop and seek stable and increased funding for the 4-H program. (Begin Winter 2006/2007; to be ongoing)

**Action Step:** Closely coordinate 4-H fund development strategies with the UAF Fund Development Office.

**Action Step:** Develop a 4-H fund development plan and strategy and integrate with the 4-H Strategic Plan and resulting new ideas, new audiences, and new focus areas. (Spring 2007)

## ISSUE 2: ORGANIZATIONAL RESTRUCTURING

### 1. Increase specialist faculty assignments (joint appointments).

**Goal:** Increase the number of specialist assignments (joint appointments) in academic or research units.

**Action Step:** Discuss opportunities and challenges of reassignment with Extension specialists. (Began October 2006)

**Status:** Discussions have been held with all non-department Extension specialists.

**Action Step:** Begin formal recruitment of specialists for reassignment and begin discussions with receiving units. (Winter 2006/2007 through Spring 2007).

**Action Step:** Begin reassignment of specialists via joint appointments with new units. (July 2007)

### 2. Create new Extension educator classifications: Regional Faculty and District Agents.

**Goal:** Create two new classifications for Extension field-based educators: 1) Regional Faculty whose geographic responsibility would extend beyond a single district and 2) District Agents whose geographic responsibility is for a single district. District Agents would be exempt staff positions and would be required to have the minimum of a bachelor's degree and to possess relevant knowledge. (Current district Extension faculty would retain faculty status.)

**Action Step:** Discuss with affected faculty the implications of regional responsibilities. (Winter 2006/2007)

**Action Step:** Faculty will develop workloads reflective of their new responsibilities. (Begin March 2007; complete May 2007)

**Action Step:** Regional Faculty will begin their new roles. (July 1, 2007)

**Action Step:** Conduct an analysis of Extension faculty and agent classifications and departmental assignments within other states. Determine policies and regulations within the UA system based on the feasibility that all new district Extension educator hires are exempt staff positions (APT). (Begin Winter 2006/2007; complete Spring 2007).

### 3. Improve communications and marketing.

**Goal:** Improve the quality and effectiveness of Extension's marketing and publication functions.

**Action Step:** Subcontract and/or develop collaborative specialized publication and information services – e.g., graphic design, editing, publication and web development and support, etc. – with other campus units that have specialized staff with expertise in these areas. (July 2007)

**Status:** Preliminary discussions have begun with Alaska Sea Grant Publication Office.

**Action Step:** Develop and implement publication standards. (Spring 2007)

**Status:** Publication standards have been developed; implementation has begun.

### ISSUE 3: BUDGET AND FUNDING

#### **1. Cut costs, increase efficiency and entrepreneurship.**

**Goal:** Reduce expenditures to help balance the budget.

**Action Step:** Over a two-year period, all tenured and tenure-track faculty will be transitioned to 9+2 month funded contracts. (Tenured faculty will be funded at the 9+2 month rate starting July 1, 2007 and tenure-track faculty will be funded at the 9+2 month rate starting July 1, 2008.)

**Status:** Faculty have been notified of the change in funding that will occur.

**Action Step:** Conduct an organizational assessment of the appropriateness of the expenditures for administrative support at both the statewide and district levels. Based upon the assessment, cut and reallocate expenditures as necessary. (Begin assessments Winter 2006/2007; complete assessments Spring 2007; implement expenditure cuts July 1, 2007.)

**Status:** The development of assessment instruments has been initiated.

#### **2. Improve fund development.**

**Goal:** Extension will significantly increase revenue generated from fund development activities.

**Action Step:** Develop a comprehensive fund development strategy in coordination with the UAF Fund Development Office. (Begun October 2006; implement Summer 2007)

**Status:** A comprehensive fund development strategy has been outlined.

#### **3. Increase revenue from grants and contracts.**

**Goal:** Increase revenue generated from grants and contracts along with an associated increase in indirect cost recovery.

**Action Step:** Over three years, increase the indirect cost recovery earned from grants from approximately \$250,000 to \$350,000.

**Status:** Indirect cost recovery incentives for faculty were initiated July 2005. Faculty have been notified they that will be transitioned to 9+2 month funded contracts with the intent that faculty will generate more grants to fund their salaries.

**Action Step:** Provide faculty with professional development training to help them apply for grants. (Begin Winter 2006/2007 and continue on an ongoing basis.)

#### **4. Establish a fee policy.**

**Goal:** Increase revenue generated from fees.

**Action Step:** Establish a uniform fee policy. (Implement July 1, 2007)

**Status:** An assessment of USDA policies and other Extension programs' fee policies and practices has been initiated.

**Action Step:** Create a secure on-line site for the collection of fees and donations. (Effective July 1, 2007)

**Action Step:** Establish an on-line publication inventory and marketing system to promote publication sales. (Effective July 1, 2007)

**Status:** A possible inventory management database is being adapted from the Alaska Sea Grant.

#### **5. Develop infrastructure support for financial goals, marketing, funding, and innovation.**

**Goal:** Create the infrastructure necessary to support Extension's financial, marketing, and innovation goals.

**Action Step:** Develop an administrative strategic plan that articulates organizational, marketing, and financial goals. (Complete July 1, 2007)

**Status:** The compact plan is the first stage in developing the administrative strategic plan.

**Action Step:** Develop a centralized customer database to support program marketing, public relations, and fund development activities. The database will be integrated to support the University's Raiser's Edge database. (Effective July 1, 2007)

**Status:** A preliminary assessment of the commercial database began Summer 2006.

**Action Step:** Engage the State Advisory Council as an active partner in Extension's promotional and revenue generation strategies.

**Status:** The November 2006 Advisory Council meeting agenda is devoted to discussing the Council's role in support of Extension's promotional and revenue generation strategies.

**Action Step:** Create clearly defined geographic boundaries for Extension districts so that a place-based identity may be created for the districts. (Implement July 2007)

**Status:** Initial geographic boundaries have been identified based on existing and proposed political boundaries.

**Action Step:** Create mechanisms to encourage innovation and entrepreneurship among faculty and staff that can improve Extension's reputation and generate new revenue. (Implement July 2007)

**Status:** An assessment of the practices used in other Extension programs began October 2006.

#### **6. Review office space and administrative support at district offices associated with CRCD campuses and other UA and non-UA sites.**

**Goal:** Reduce office rent and administrative support costs while increasing integration at district Extension offices co-located at CRCD campuses and other UA and non-UA sites.