MU Extension Renewal: Extension Staffing Plan Proposal

CONTEXT – HOW WE RESPOND EFFECTIVELY TO THE NEEDS ASSESSMENT

The Building Our Future Together assessment highlights the needs of Missourians and the possibilities of the University of Missouri Extension and Engagement addressing those needs. The full report of the needs assessment will be released at the Extension Summit in October 2017; in summary, there were three critical Grand Challenges that emerged, which may be identified as issues related to the economy, education, and health. For MU Extension and Engagement to best address these challenges requires careful consideration of how to renew the programming developed and delivered by MU Extension and Engagement. Renewal is a process that assesses current conditions, then builds on identified strengths, addresses identified challenges, and focuses efforts toward greater impact. Renewal is cyclical, requiring ongoing intention toward improvement.

MU Extension’s Renewal Process attempts to focus our work on measurable and clear impact. It includes at least four critical parts. The first step was multidisciplinary organizational alignments toward impact and related budgetary decisions announced in June 2017. The other three parts have begun and will continue with faculty, staff, and stakeholder input.

1. Leading toward impact: Budget and organizational alignment.
2. Workforce Plan to address impact: High-tech / High-touch staffing.

This document is an update and request for input on the part 2, our efforts to rethink our extension faculty workforce.

EXTENSION SPECIALIST PLAN – PURPOSE AND INTENT

For extension specialist planning, we have sought to update the model that has served MU Extension well for over 50 years. The regional model designed in the 1960s was effective at a time of limited telecommunication technologies and at least twice the numbers of regional specialists as what we have now. In order to ensure the effectiveness of our programming portfolio in addressing our grand challenges, we must find a balance between that which is “high-tech” (sophisticated science delivered through innovative means) and “high-touch” (engaged collaborations and support with the Missourians we serve). Toward that end, over the summer MU Extension’s academic leadership has been working through possible revisions to our extension specialist workforce plan. Draft plans were evaluated based on whether they improved upon our current model in the following ways:

- Better impact.
- Better addresses the Building Our Future Together needs assessment.
- Better reach to Missourians.
- Better driver of innovation and collaboration.
- Better support for cycles of continuous improvement.
- Better catalyst for future strategic growth.
- Better flexibility for future needs.
- Better adaptability for county/local needs.
- Better geographic coverage of our program areas.
EXTENSION SPECIALIST PLAN PROPOSAL COMPONENTS

The staffing plan proposal includes the following elements to achieve the high-tech, high-touch balance.

1. Clarification of all faculty and academic leadership roles.
   a. Four faculty roles (state specialist, field specialist, county engagement specialist, and extension educator/instructor/counselor/associate/assistant) and three academic leadership roles (regional director, education director, senior program director) are defined more fully below.
   b. The role definitions are meant to guide, but with flexibility to meet the needs of programs and local contexts. Therefore, appointment letters and annual work plans will delineate more specifically the role of any particular faculty member.

2. Tighter focus within regional faculty roles in duties and geographic coverage.
   a. The role of Regional Specialist is re-defined as a Field Specialist to acknowledge that service coverage does not necessarily align with MU Extension’s regions, to anchor each specialist primarily to his or her disciplinary field, and to signal a shift from past practices. Some Field Specialist program areas warrant local (high-touch) coverage to meet needs, while some Field Specialist program areas warrant regional or statewide (high-tech) coverage to meet needs.
   b. The role of the County Program Director is eliminated. In its place, some Field Specialists will be serving in an expanded role called County Engagement Specialist, which is defined below. County Engagement Specialists have the same disciplinary qualifications as Field Specialists and deliver programming, but in a much more tightly defined service area (one to three counties). Unlike the CPD role, which was framed as additional duties, the County Engagement Specialist is framed as a position that is distinct.

3. Consistent geographic coverage of programming across the state.
   a. In the six suburban/rural regions (Northwest, Northeast, Southwest, Southeast, West Central, East Central)
      i. Suburban/rural County Engagement Specialists will work in trios and represent three specialties which address the three grand challenges identified in the needs assessment: the economy, education, and health. Half their time will be delivering programming in their specialty to the three counties. Half their time will be serving in the county engagement capacity.
      ii. Other Field Specialists will have identified local or regional service areas that ensure consistent coverage across the state. Most will continue to be housed in county offices, but some, depending on their individual plan of work and programming needs, may be housed at affiliate institutions.
   b. In the urban region (Urban West, Urban East)
      i. Urban County Engagement Specialists will also represent specialties which address the three grand challenges. Given the high population and numbers of specialists, each county will identify its own plan for programmatic coverage. Depending on the size of the county and administrative needs, the County Engagement Specialist’s time will include some time delivering programming in their specialty to the county, but more time will be serving in the county engagement capacity.
      ii. Other Field Specialists will ensure better program coverage in these large population areas.
Sample Illustration of Specialist Placement – Levels of Coverage in a Section of the State

In the diagram below, a nine-county section of the state conveys a possible example of how the model would provide more consistent programmatic coverage. There is nothing particular in the model relevant to nine counties; this is just a manageable area to illustrate a possible implementation of the model, modified to fit the needs of a specific area. This is just an example of what the model could look like; it is not meant to convey any actual specialist placements.

1. **County Engagement Specialists.** The sample area is served by nine County Engagement Specialists, who work cooperatively in trios. The illustration’s connection lines signal the trio groupings. The CES specializations are Nutrition and Wellness Education, 4H Youth Development and Education, and Community-Economic Development.

2. **Field Specialists.**
   a. **Local coverage.** The sample area is served by six Field Specialists, representing three program areas, with a localized coverage area. They are most likely to be located somewhere within a geographic area of the size shown in the sample. Their specific placements and coverage area are based on local need. The illustration’s grey shadings signal local coverage areas. The local specializations include two Specialists in Animal Health and Production, two Specialists in Plant Health and Production, and two Specialists in Family and Home Education.
   
   b. **Regional coverage.** The sample area is served by four Field Specialists, representing four program areas, with a regional or statewide coverage area and who may or may not be located in this particular sample area. Their specific placements and coverage area are based on regional need. They are shown on the area’s periphery, and cover the whole area. Note that some of their program area’s more high-demand programming may be covered in part by the County Engagement Specialists, depending upon the program area work plans designed by program faculty. The regional specializations include a Specialist in Agriculture Business and Policy, a Specialist in Natural Resources and the Environment, a Specialist in Business Development, and a Specialist in Labor and Workforce Development.

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**County engagement specialists**
- **N** Nutrition and Wellness Education
- **C** Community-Economic Development
- **Y** 4-H Youth Development and Education

**Field Specialists – Regional Coverage**
- **AB** Agriculture Business and Policy
- **NR** Natural Resources and Environment
- **BD** Business Development
- **LW** Labor and Workforce Development

**Field Specialists – Local Coverage**
- **A** Animal Health and Production
- **P** Plant Health and Production
- **F** Family and Home Education

**State Specialists** provide additional coverage in these and more areas.

Educators and others are not shown.
EXTENSION FACULTY ROLES

State Specialist
- Program Development & Improvement
- Applied Scholarship & Innovation
- Statewide Engagement / Vitality
- Statewide Programming / Technical Assistance / Delivery

The central role of the State Specialist is to develop and improve upon research-based programming, technical assistance, publications, and other resources to extend and apply the knowledge of the university. State specialists are most often appointed collaboratively with a home college or school, and may have a wide mix of duties dependent upon the nature of the appointment in the academic home department. State specialists are typically either tenured/tenure-track or ranked non-tenure track faculty, and many also have teaching and/or research appointments within their colleges.

Specific duties of individual State Specialists are determined annually in a Plan of Work, which should articulate to the collective Plan of Work in the specialist’s primary (and secondary, if applicable) extension program area.

State specialists partner with Field Specialists and County Engagement Specialists in program development and improvement. Research in support of their extension State Specialist appointment (distinct from a research appointment) should be related to the application of knowledge and associated programming.

State specialists also engage with statewide stakeholders, are seen as authorities in their disciplines, and devote some time to delivering specialized programming.

Extension Educator, Instructor, Counselor, Associate, and Assistant
- Area Programming / Technical Assistance / Delivery
- Program Administration & Engagement

The role of Extension Educators, Instructors, Counselors, Associates, and Assistants is to deliver education and services within a defined area. Positions vary based on specific expertise and duties of the position, and include titles such as Extension Educator, Instructor, Adjunct Instructor, Business Development Counselor, Agriculture Paraprofessional, Youth Program Assistant, and Nutrition Program Assistant.

Additional duties may include support of program administration and engagement within the targeted sector(s) of the programming and the population(s) being served.
Field Specialist
Area Programming / Technical Assistance / Delivery
Program Development & Improvement
Area Engagement / Vitality
Applied Scholarship & Innovation

The central role of the Field Specialist is to deliver within a defined service area research-based programming, technical assistance, publications, and other resources that extend and apply the knowledge of the university. Field Specialists are ranked non-tenure track faculty. New Field Specialists will be appointed into ranked non-tenure track titles. Current Regional Specialists in unranked appointments will be converted to ranked titles through a process that is fair to current ranked NTT Regional Specialists.

Specific duties of individual Field Specialists are determined annually in a Plan of Work, which should articulate to the collective Plan of Work in the specialist’s primary (and secondary, if applicable) extension program area.

Field Specialist service areas will vary depending on the specialization, location, and need. As well, Field Specialists partner with State Specialists in program development and improvement, and work plans may include time to partner with or lead applied research. All Field Specialists are to engage with stakeholders in their service area and the sectors and populations being served.

County Engagement Specialist
County Engagement / Vitality
County Administration
Area Programming / Technical Assistance / Delivery
Program Development & Improvement
Applied Scholarship & Innovation

The County Engagement Specialist is a Field Specialist, with a central role to engage intentionally and comprehensively with their county and to engage with and connect the county to the University. County Engagement Specialists are ranked non-tenure track faculty. New County Engagement Specialists will be appointed into ranked non-tenure track titles. Current Regional Specialists in unranked appointments will be converted to ranked titles through a process that is fair to current ranked NTT Regional Specialists.

Specific duties of individual County Engagement Specialists are determined annually in a Plan of Work, which should articulate to the collective Plan of Work in the specialist’s specific program area and general grand challenge area. The Plan of Work should also articulate to the needs and prospects for impactful engagement in the county.

The county engagement role includes county office administration, but focuses on local needs assessment, planning, referral, connection, responsiveness, and monitoring to the benefit of county residents. The specialists are expected to be well-known representatives of the university in their county, and they are expected to deeply understand the context, needs, and opportunities in their county. Proposed details, expectations, and feedback on the role of engagement in our work will be discussed at the Extension Summit in October 2017.

Like Field Specialists, County Engagement Specialists are experts in their disciplines and deliver research-based programming in their area of specialization. The areas of specialization of County Engagement Specialists will connect with the three Grand Challenges identified in the needs assessment – economy, education, and health – and program delivery may include a breadth of specializations in the connected area. Various academic backgrounds and specializations may appropriately be identified as connected to these three challenges. The annual plan of work for a particular County Engagement Specialist may include program development and/or applied scholarship, but these duties are not the focus of the position.

In urban regions, County Engagement Specialists may have a single county service area, but with expected connections to many more community partners, collaborators, and citizens. In rural/suburban regions, they have a three-county service area. Each County Engagement Specialist works in close collaboration with the other two County Engagement Specialists representing the other two Grand Challenge Areas.
EXTENSION ACADEMIC LEADERSHIP ROLES

Note on Field and County Engagement Specialist Supervision

Regional Directors are the supervisors of both Field Specialists and County Engagement Specialists, providing primary administrative and human resource leadership. However, the processes and decisions related to appointment, evaluation, and promotion of Field Specialists and County Engagement Specialists are undertaken collaboratively with Education Directors and Senior Program Directors. Education Directors lead development of the Plans of Work of Field Specialists and County Engagement Specialists (in relation to their programmatic duties). The processes of appointment, evaluation, and promotion are shared with these leaders by the state, field, and county faculty themselves through their collective and elected governance bodies.

Regional Directors
Regional Engagement & Strategic Leadership
Regional Operations & Fiscal Leadership
Faculty & Program Operational Leadership

The role of the Regional Directors is to lead engagement of the University of Missouri’s strengths/capacities to meet our state’s Grand Challenges and to acquire and deploy the resources needed for transformative impact. Regional Directors work proactively to design and implement innovative responses to current and emerging regional needs.

Regional Directors align and converge the talent, strengths, and resources of the University of Missouri, local partners, industry, and other institutions to forge mutually beneficial partnerships meeting the needs of all Missourians.

Through primary leadership and development of Field Specialists, County Engagement Specialists, extension councils, and other partners, programs and services are delivered to maximize the engagement and value-adding impacts of the University of Missouri. This will be accomplished through collaboration with university administration, Education Directors, and Senior Program Directors.

Senior Program Directors
Statewide Engagement & Strategic Leadership
Program Operations & Fiscal Leadership
Faculty & Program Academic Leadership

The role of the Senior Program Directors is to provide executive and strategic leadership for the integrated, multi-disciplinary activities of the impact area. This leader frames a systems approach to ensuring extension and engagement education and services lead to measurable impacts. Responsibilities include operational and fiscal accountability, from budget and staff planning and to sound management of financial, physical, and human resources. They ensure that programming is innovative, collaborative, inclusive, and effective. The Senior Program Director role is that of a university and statewide leader in the programming areas, engaging and developing partnerships with internal and external stakeholders.

Education Directors
State Specialist and/or Center/Institute/Grant Administration
Faculty Quality Leadership
Program Quality Leadership

The role of Education Directors includes leadership functions that are secondary to the primary appointment. Typical primary appointments are those of a State Specialist faculty member or as director of a center, institute, or major grant.

The Education Director portion of the appointment, which represents a quarter to a third of the individual’s effort, is focused on ensuring quality programming in the program area by facilitating the implementation of faculty-led systems of development, delivery, and improvement of extension and engagement education and services. This is a first-among equals leadership role supporting program area planning and improvement. In cooperation with campus department chairs/directors or Regional Directors, this planning also connects to individual faculty work plans and improvement. A critical function of the Education Director is to ensure that education and services build from appropriate research foundations and are aligned toward measurable impact.
### Faculty and Academic Staff Distribution

**Draft Proposal – September 2017 – Numbers Are Approximate**

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ACADEMIC STAFFING PLAN PROPOSAL – REQUEST FOR INPUT

To assess and refine this proposal, we are gathering input from internal MU stakeholders including our faculty, staff, partner colleges; county extension councils and county commissions; regional and state extension councils; and other stakeholders, partners, and affiliates. **No final decisions have been made about the model itself, nor about the role of any particular faculty member – your input is requested.** Over the next six months, we will have meetings, conversations, surveys, and other opportunities to discuss our stakeholders’ insights on this proposal, and to adjust in ways that will better serve Missourians. Over the next six months, MU Extension and Engagement leadership plans to meet with all faculty and staff, in small groups and at the summit, and to meet with all Missouri counties, including county commissions and county councils. Implementation of any new plan will not begin before spring 2018.

Toward that end, we invite Extension faculty, staff, and partners to participate in the following initial sessions for feedback and questions.

**Sessions for Feedback and Questions**
Friday, September 15. 4:00 p.m. – 4:00 p.m.
Via Adobe Connect: http://univmissouri.adobeconnect.com/blakenaughton/

Tuesday, September 19, 10:15 a.m. – 11:30 a.m.
Northwest Region Faculty Meeting, United Methodist Church, 104 W. Samuel, Hamilton, Missouri
Simultaneously broadcast via Adobe Connect: http://univmissouri.adobeconnect.com/blakenaughton/

Thursday, September 21, 2:30 p.m. – 4:00 p.m.
MU Campus Memorial Union, Room S304
Simultaneously broadcast via Adobe Connect: http://univmissouri.adobeconnect.com/blakenaughton/

In addition, evening sessions specifically for members of MU Extension Councils will be scheduled soon.

We also invite responses to the following questions, via this survey: https://missouri.qualtrics.com/jfe/form/SV_5o6lZs5NCG0wNxj

1. Do you believe this staffing proposal will positively impact programming in your community, your target program sector, or the state?
2. Do you believe this staffing proposal will better address our needs assessment?
3. Do you believe this staffing proposal will help increase collaboration?
4. Do you believe this staffing proposal will better connect innovation to application?
5. How do you see this staffing proposal impacting you personally in your Extension role?
6. Who are stakeholders in your community who might help make a new staffing model successful?
7. How supportive are you of this staffing plan proposal? [Scaled response.]
8. What final thoughts and insights would you share on this staffing plan proposal?