Program Integration Handbook

This document was last updated in December of 2014. If you have questions that are unanswered after reading through this handbook, contact Sherry Howard at howardsb@missouri.edu.

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Introduction
This handbook is intended to provide further information about the processes at work in program integration and how to get involved. When reading through this document, please understand that these processes do not change programming or administrative roles within MU Extension. It is the intent of this process to enhance extension's ability to develop comprehensive solutions to complex societal issues. 

This does not change organizational structure or current programs and disciplines.
Program areas continue to operate as core disciplinary functions delivering research-based education through local programming.

The role of statewide program directors, regional directors and continuing education directors does not change.
Directors will continue to be responsible for providing direct supervision and leadership to faculty and staff, as well as program leadership in areas of responsibility.

Thematic team process
Program development has historically been done in a silo environment, but complex issues require complex solutions that pull resources from more than one academic area. MU Extension thematic teams and programs have areas of expertise related to the theme in which they work. Teams are composed of faculty, staff, partners or other organizations that include campus Continuing Education and regions.
The following team configurations will be in place during the program integration process.

Core Thematic Team
A core group, led by a facilitator, guides the program through a five-phase process. Core team members will bring knowledge of the theme from different perspectives and work together to identify key issues and priorities.

Ad Hoc Thematic Team Members
People with a variety of expertise join the process as needed, while the Core Team guides the program(s) through the five phases of organizing program integration.

Project Teams
Project Teams are appointed in Phase II (see below) to focus on specific audience and program areas. These teams will consist of one or two members of the core team along with additional faculty, staff and partners with specific expertise related to that program area.
The thematic program integration process is illustrated below. It is a holistic approach to:
• identify the audience,
• analyze opportunities,
• develop the program,
• deliver the program,
• evaluate the program, and
• report program impact.
A list of current team members is available at the end of this handbook, along with their contact information.

Program conception and development
Phase I: Idea generation
Teams identify key societal roles or economic opportunities that align with extension’s vision, mission and core strategic competencies. Faculty, staff or thematic team members evaluate and test ideas for feasibility, alignment and scaling potential. In doing so, consideration is given to how a new idea relates to existing programs or other ideas being considered. This is an exploratory process in which all individuals are fully empowered to recommend and take action to move an idea to the next step. When possible, concepts and ideas should also link to the University of Missouri, Mizzou Advantage or the National Institute for Food and Agriculture. Thematic Team members are to use this insight to better align and assist extension faculty and staff in developing aligned transformational proposals.

Phase II: Concept development
During concept development, the Thematic Teams are charged to aid in moving an idea forward. This involves working with the party that generated the idea and, as needed, evaluating, researching and meeting with experts and faculty on a variety of conditions within the thematic area. Based on their findings, the team supports faculty and staff in developing preliminary
concepts aligned with established parameters for program integration. Developed concepts are moved to the next stage for approval.

Phase III: Concept approval
Approval by the Steering Committee is based on a 10- to 15-minute pitch made by the core thematic team and other engaged faculty and staff. During or following the pitch, the committee provides feedback and makes recommendations as appropriate. Afterward, the committee may:
- Approve as requested (or based on specific recommendations) and provide funding to move to the next step.
- Recommend changes for modifications that enable future consideration.
- Decline, which is not an indication of the value of the idea, but could indicate that the committee does not see sufficient alignment with extensions mission, vision and values.

Phase IV: Proposal development
Thematic Teams are not designed to take ideas into development and delivery, so further development of the concept for final proposal typically involves ad hoc additions to the team to work on the idea and the creation of a development team. Ordinarily, these ad hoc team members will ultimately be appointed to the program development team that builds out the program. During this time, the development team creates a full proposal that provides details related to staffing, resource requirements and delivery before moving to the next step.

Those ad hoc members will become the core of the five-person program development team. The Core Thematic Team, along with engaged faculty and staff, present their fully developed proposal to the Program Integration Team.

Phase V: Proposal approval
Approval by the Program Integration Team is based on a review to make certain the proposal justifies the commitment of resources needed to create the necessary program development team(s) of faculty, staff and partners to do the necessary development, training and deployment. The review will result in three possible outcomes:
- Approve as requested (or based on specific recommendations) and provide funding to move to the next step.
- Recommend changes for modifications that enable future consideration.
- Decline, which is not an indication of the value of the idea, but could indicate that the committee has concluded the resource allocation for success is not justified.

Phase VI: Program development
Program development takes place once funding has been approved. The fully staffed team oversees the development and deployment of the proposal. The build-out of the proposal includes how it will be delivered, who will deliver and the needed training for personnel, if needed. The development team will recommend metrics that drive the desired behavior and align with Missouri Banner Outcomes.

The Program Development Team, if not already formed, should be formed at this point and empowered to build out the proposal as designed. The build-out of the proposal will include how it will be delivered, who will deliver and to the degree needed training for extension personnel. Finally, the Program Development Team recommends metrics designed to support the analyses to determine whether the program achieved its stated educational objectives, behaviors, outcomes and impacts. Following approval by the Program Integration Committee, the Program Development Team will discuss the feasibility of resource allocation for the program, including such consideration as platforms, methods of delivery or synergy for support networks.

Phase VII: Program delivery
This phase requires the sign-off of the appropriate regional directors and program directors (including continuing education). Throughout delivery, the system involves those who signed off as is appropriate for the purpose of gaining feedback and aligning to organizational issues. The intent is not to limit academic freedom, but to guide faculty and staff to fundable and sustainable programs.
Phase VIII: Review and Analysis

Review and analysis are dependent upon outcomes and impacts, as planned for in the program development process. Review and analysis provide an understanding of the effectiveness of the offering and how it is delivered. Analysis is conducted by the development team and the appropriate regional and program directors (including CE). Analysis results in one of the following recommendations:

- Continue program as is.
- Continue program with modifications.
- Consider how the program might return to the beginning phase and be reworked or added to another idea to create a different program offering for future consideration.
- Discontinue program, which is not an indication of the value of the idea, but could indicate that the committee has concluded the resource allocation for success is not justified.

Track the progress of each thematic team’s individual programs using the pipeline spreadsheets found on the Questions and Answers page. These spreadsheets are updated quarterly.

How to get involved

There are several ways to get involved with the program integration process. You can submit an idea for a program or be a thematic team member or facilitator. As teams have need of specialized expertise, you might be called upon or volunteer to serve as an ad hoc team member.

Idea generation

In the beginning stage of any project, faculty or staff generate program ideas or concepts to address a societal issue. Extension faculty and staff are encouraged to bring their ideas or concepts to the attention of thematic team facilitators for consideration. These might be entirely new programs or rooted in existing programs that can be scaled up to address a broader audience. As the contributor of an idea or concept, faculty or staff can decide to remain involved in the process or entrust their idea to a thematic team to move the process forward toward a development team.

Ad hoc team members

As program concepts move through the development process, thematic team facilitators bring on ad hoc team members to contribute specialized knowledge to the project as needed. Individuals interested in becoming ad hoc team members should contact the relevant team facilitator.

Thematic team members

As needed, a thematic team facilitator seeks team members to broaden a team’s skill set. If you are interested in participating in the process, express your interest to the appropriate facilitator.

Thematic team facilitators

A facilitator provides a thematic team with leadership in the interest of identifying ideas and concepts and seeing them through to becoming a viable program.

When a team facilitator position is vacant, peers, colleagues and supervisors can nominate employees to be program integration facilitators. Before submitting a name for consideration, ensure the co-worker is willing to serve as a facilitator. If interested in serving as a facilitator or team member, employees are strongly encouraged to apply directly. The thematic team facilitator nomination/interest form is available at [http://extension.missouri.edu/staff/documents/pi/PI_facilitator_nomination_form.pdf](http://extension.missouri.edu/staff/documents/pi/PI_facilitator_nomination_form.pdf).

Email the nomination/interest form to Sherry Howard at howardsh@missouri.edu, or drop it off in person to:

Associate Vice Provost for Programs
108 Whitten Hall
Attn: Sherry Howard

The program integration work group reviews all nomination/interest forms. The work group consists of a representative from each of the four administrative areas: continuing education director (John Worden), regional director (Mark Stewart), program director (Ina Linville) and associate vice provost for programs (Beverly Coberly).

Appointment of thematic teams

Thematic teams are appointed under the guidance of the Program Integration Leadership Team, with administrative liaison responsibilities through the associate vice provost for programs.

The following principles, adapted from Mizzou Advantage, will guide the teams:

- Thematic teams are not existing organizational units.
• Facilitator and core team appointments are for three-year terms. The additional team members’ appointments are fluid, as team goals and objectives for a specific program area are fulfilled and additional goals or objectives are identified.
• Participants and collaborators are diverse. They include faculty and staff from university departments or centers as well as partners outside the University of Missouri who can improve the thematic team’s capability to deliver a program.
• Thematic teams creatively engage university research and extension to provide interdisciplinary educational programming that helps Missourians solve problems and address issues facing families, businesses and communities.
• Participants collaborate on activities such as grants, contract work, conferences and other program delivery efforts.

**Thematic team facilitator roles and expectations**

Each Core Thematic Team is led by a facilitator who is passionate about improving the world through education and research. Facilitators should also have strong process and organizational skills and lead their teams. Time required for the facilitator role varies based on current job responsibilities and is negotiated with facilitators and their supervisors.

Facilitators should possess the following characteristics:

• A broad understanding of the issues underpinning their thematic area and MU Extension
• Strength in developing relationships and bringing people together in productive dialogue
• Capacity for developing and supporting strong networks
• Skill in collaborating with corporate entities and other non-university partners, including foundations and granting agencies
• A thorough understanding of the academic world and Missouri communities

The thematic team facilitator’s main roles are to:

• Committing to creative activity in scholarship, community and programming
• Guiding the formation of the core team, while interfacing with thematic teams and program integration teams
• Assisting the core team with audience and program identification, sub-team formation, program development, delivery and evaluation, and revenue generation

The team facilitator is accountable to the program integration team, with ultimate responsibility to the associate vice provost for programs. Resources such as travel, clerical support, process support will be made available to support teams.

**Canvas**

The canvas is a document that clarifies the feasibility of an idea for development. Documents explaining the team decision canvas are forthcoming.

**Team decision grid**

A team decision grid helps the team make an informed decision about a possible solution to a societal issue. Groups may weigh components differently, but the following components should be present in the decision-making process.

**Feasibility**

• Are there known effective solutions?
• How realistic is it that MU Extension and its partners can address the problem and get results?
• Do we have or can we access the necessary expertise and resources?

**Seriousness**

• Is the problem or the need increasing?
• How severe are the consequences?
• What would happen if the need is not addressed?

**Unmet or unaddressed needs**

• Is anyone else addressing this issue?
• Does it need more attention?
• Is MU Extension the only organization equipped to address it (in contrast to it already being addressed by multiple entities)?

**Opportunity**

• Are there key partners or funding sources that could assist MU Extension in addressing this need?
• Would addressing this need position MU Extension well or raise visibility across the state?
• Are revenue opportunities associated with the feasible needs identified?
Support for team facilitators and teams

Teams and facilitators receive financial support with cost dollars to support the program integration concept and teams. Administrative support for facilitators is provided as needed. As team functions grow, additional negotiations may be necessary to ensure that teams have appropriate support. The program integration committee meets quarterly with facilitators to respond to team and facilitator needs.

Travel expenses are covered for the development and the work of the program team. Professional development to expand facilitator or team member capacity is determined on a case-by-case basis. Specialized equipment needs and requests are reviewed on a case-by-case basis.

Although each team has specific situations and needs, the following recommendations should be used generally in beginning a team.

Facilitators

Facilitators are supported through:

- program incentives,
- scholarship possibilities,
- performance recognition for leadership efforts, and
- credit for revenue generation.

Facilitators agree to serve for as much as 20 percent of their time over a period of several years. Facilitators’ current assignments may change to reflect the expected amount of time needed to facilitate their program integration areas.

Facilitators benefit from the career enhancements and professional development opportunities that come from being leaders of well-resourced integrated programs.

Teams

Operational dollars will be provided for the development of the five core program integration teams. Requests for proposals (RFPs) will be reviewed to provide seed money for startup costs and early program match funds. Teams are expected to use development and RFP dollars to leverage additional grants and contracts.

Teams are expected to generate revenue to further the mission, goals and values of MU Extension. Revenue generation opportunities include fees, contracts, grants, gifts and sponsorships. The expectation is that revenue is shared as a return on investment with MU Extension and home departments.

Additional information

This section provides process-specific information on the approval phases of program integration. This section is intended to provide a deeper level of understanding of the process and players involved in each phase.

Phase III: Concept approval

Approval by the Steering Committee is based on a 10- to 15-minute pitch made by the core thematic team and other engaged faculty and staff. During or following the pitch, the committee provides feedback and makes recommendations as appropriate. Afterward, the committee may:

- Approve as requested (or based on specific recommendations) and provide funding to move to the next step.
- Recommend changes for modifications that enable future consideration.
- Decline, which is not an indication of the value of the idea, but could indicate that the committee does not see sufficient alignment with extensions mission, vision and values.

To ensure proposals are aligned, scalable and sustainable, they are reviewed by the Integration Committee or Steering Committee. Faculty, staff and the team to develop a two-page application and a short pitch to evaluate if issues have been addressed well enough to justify and attract the needed seed funding.

Once a concept is approved by a majority vote of either the Program Integration Committee or the Steering Committee, the Core Thematic Team and the engaged faculty and staff are authorized to develop a full proposal.

The team and engaged faculty and staff also start the process of identifying potential program development team members. Where practical, these identified members may be transitioned on the Thematic Team as ad hoc members for the purpose of developing the identified proposal. Other members of the program development team will be identified as soon as doing so is practical.

Phase V: Proposal approval

Approval by the Program Integration Team is based on a review to make certain the proposal justifies the commitment of resources needed to create the necessary program development team(s) of faculty, staff and partners to do the necessary development, training and deployment. The review will result in three possible outcomes:

- Approve as requested (or based on specific recommendations) and provide funding to move to the next step.
- Recommend changes for modifications that enable future consideration.
Decline, which is not an indication of the value of the idea, but could indicate that the committee has concluded the resource allocation for success is not justified. If approved, team should consider this as approval to seek commitments for the resources needed and to recruit the needed program development team(s) of faculty, staff and partners to do the necessary development, training and deployment. Program development teams are strongly encouraged to work closely with appropriate regional, program and continuing education directors, especially when seeking resource commitments.

Once the request advances to an approved proposal a program development team will be fully staffed to oversee the development and deployment of said proposal. Program integration is intended to guide extension toward becoming customer, client, learner and stakeholder driven in a way that strategically aligns to vision, mission and values.

**Phase VIII: Review and analysis**

Review and analysis are dependent upon outcomes and impacts, as planned for in the program development process. Review and analysis provide an understanding of the effectiveness of the offering and how it is delivered. Analysis is conducted by the development team and the appropriate regional and program directors (including CE). Analysis results in one the following recommendations:

- Continue program as is.
- Continue program with modifications.
- Consider how the program might return to the beginning phase and be reworked or added to another idea to create a different program offering for future consideration.

Discontinue program, which is not an indication of the value of the idea, but could indicate that the committee has concluded the resource allocation for success is not justified. Analysis is conducted jointly by the development team and appropriate regional, program and continuing education directors. Recommendations for continuous improvement of the offering and delivery will be implemented by the engaged faculty and staff. Information on the next generation of the offering or a related offering should start back at the beginning of the program integration process to think through the concept, proposal, development and deployment of the new or revised program and underlying strategic capabilities and competencies.