

# Agriculture and Natural Resources Leaders' Guide<sup>1</sup>

## **Introduction**

This guide's purpose is to help ANRE faculty and academic staff understand the roles of team coaches, co-leaders and members of our self-directed teams. This document intends to be dynamic and a guide to how teams function. All team members must participate in team leadership if the teams are to succeed. We welcome any suggestions that you have about team leadership and this planning guide.

## **The Role of Coaches**

The primary responsibilities of ANRE coaches are to advise the self-directed teams and facilitate their work. Coaches work with team co-leaders to guide team planning and reporting. Coaches help teams develop consistent approaches to developing their mission, objectives and measurable outcomes. Coaches promote communication and share ideas among the teams. They help teams identify and secure the resources they need to achieve their objectives. They help the teams involve the people – both internal and external to the ANRE program area – who are needed to accomplish its tasks.

## **The Role of Team Leaders**

The primary role of ANRE team co-leaders is to manage and coordinate the work of the teams. Co-leaders manage the day-to-day functions of the teams and their associated work groups. Co-leaders coordinate work activities and team-related responsibilities assigned to work group leaders and other team members. Co-leaders work with their team members to develop team mission, outcomes and impact indicators. They encourage team members to report against the impact indicators and to develop success stories and *Impact Reports* to be used by the team, the ANRE program area and Cooperative Extension.

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<sup>1</sup> This is an evolving compilation of procedures relating to the responsibilities of coaches and co-leaders for Self-Directed Teams in the Agriculture and Natural Resources (ANRE) program area of Cooperative Extension. This guide will be continuously modified and expanded as we gain experience in team programming. The Coaches Team approved this revised guide February 2002.

## **Coaches and Team Leaders facilitate planning**

Coaches and co-leaders ensure that teams accomplish the elements of team planning.

- *Develop a mission statement.* A mission statement helps the team refine its focus. The mission statement should be brief – no more than a sentence or two.
- *Define primary objectives in terms of measurable outcomes.* Teams should identify one to five primary objectives for a one- to three-year time frame. Each objective should have a measurable outcome or outcomes so the team can demonstrate progress or success. Measurable outcomes will help the team determine if it has achieved its goals and how its work has made a difference to constituents.
- *Identify or develop an educational program focused on the team's objectives and outcomes.* This program may consist of course curricula, printed materials, workshops, demonstrations or audio/video materials.
- *Develop an evaluation plan.* The evaluation plan should be tied directly to the planned outcomes, with the plan developed as the outcomes are defined. Team should focus evaluation efforts on activities with measurable statewide or multi-county outcomes that have impact with the team's clientele. The Program Development and Evaluation Unit can help teams develop evaluation plans.
- *Develop a communication plan and strategy for reporting its accomplishments.* Teams should develop both internal (among team members) and external (public) communications plans. Teams should provide consistent information for the program area web site and develop, with available assistance, team web pages with more detailed information on team plans and accomplishments. In addition, team leaders will help team members think through how they will tell their teams' success stories to decision-makers, the media, interest groups and other external audiences.

## **Acquiring resources to do the job**

*Professional development needs.* Coaches will solicit meaningful professional development funding proposals from team leaders and will attempt to find resources for provide professional development opportunities. Examples of professional development needs for team leaders include evaluation, program

development, process skills and leadership training. Team members should benefit from subject matter training related to team projects and outcomes.

*Program development, evaluation and communications assistance.* The coaches will serve as an intermediary between team co-leaders and the UW-Extension's Program Development and Evaluation Unit's staff members to better advise teams on team functions, outcome development and evaluation methods. The coaches will also serve this connecting capacity by working with public information staff on communications planning.

*Funding.* The coaches will help teams develop proposals that make best use of UW-Extension funds, when they are available, to support programs and leverage outside support. Coaches will help teams access a variety of sources of funds and work with other teams, groups and organizations to build broader funding coalitions.

The program area will use one-time funds, when available, for team meetings (both in person and via teleconferences), communications assistance and project support. (Project support, when available, will fund focused programs or projects that have measurable impact on a multi-county or state basis, and leverage additional funds. The coach's team will make these allocation decisions.)

*Administrative and logistical support.* Each coach will work with team co-leaders, other coaches and Extension administration to provide administrative and logistical support in ways that serve the needs of team members, without burdening administrative support personnel of the team co-leaders or coaches. This support will involve maintaining team membership lists, scheduling meetings, covering expenses, submitting grant proposals and completing team plans and reports. (See attachments relating to listserv maintenance and Wisline audioconferences, web site creation and processing team expenses.)

### **Soliciting a diverse membership**

*Extension faculty and staff.* Team coaches and co-leaders will work with the ANRE program area leader to encourage others in UW-Extension to become members of ANRE teams. Coaches will encourage team co-leaders and members to build collaborative relationships and partnerships around issues that are important to two or more program areas.

*UW research faculty.* Team coaches and co-leaders will work with the ANRE program area leader to build on her or his UW connections to influence research priorities and develop new relationships between research and extension.

Coaches will encourage team co-leaders and members to build team, work group or project connections with researchers.

*Stakeholders and constituents.* Coaches and team co-leaders will involve stakeholders and constituents in the team's activities. Teams will decide how, when and where to involve these people.

### **Working as a group**

Coaches and team leaders will encourage effective group processes and promote team skills. As group leaders they will develop those skills in themselves. (See "Working in Groups," "States of Group Development," "Ten Commandments of Effective Group Communication," and other group process materials from the UW-Extension Strategic Planning Program.)

## Attachment #1 – E-mail Group List Maintenance

The group e-mail distribution lists – one for each team -- are unrestricted, open lists. This means that members can subscribe and unsubscribe themselves, and anyone can post messages to the lists.

Each list has co-owners who are responsible for:

- 1) Helping people subscribe or unsubscribe.
- 2) Receiving and responding to error messages.
- 3) Monitoring email list exchanges; keeping the lists up-to-date.

The program area support person will be a co-owner of each list. Teams are responsible for naming a second co-owner.

For list information, go to this web site: [www.uwex.edu/infosys/mailman/](http://www.uwex.edu/infosys/mailman/)  
Mailman is the web-based mail list manager used at UW-Extension.

## Wisline Teleconference Scheduling

The program area receives an allocation of minutes for Wisline teleconferences each year. Team meeting and work group teleconferences will be scheduled as needed. Teleconferences can be scheduled in one of four ways: 1) call Wisline at (608) 262-0753; 2) email Wisline at [wisline@ics.uwex.edu](mailto:wisline@ics.uwex.edu); 3) fax Wisline at (608) 263-4435; or 4) complete the Wisline web form at the web site shown below. You will need to provide the following information:

- State that this is a CE-sponsored teleconference
- Request the use of the 800 line
- Program area and Team name
- Use conference code #8729
- Date and time of teleconference
- Length of teleconference
- Number of lines needed
- Moderator's name

Important items to note:

- 1) To connect to a self-directed team teleconference, county participants will call 1-800-462-1257, provide the conference code followed by the # button and their pin number followed by the # button. Madison participants will call 265-1001 and provide the conference code followed by the # button. If participants are part of the team and the team is paying their long distance charges, outsiders

must dial the 1-800-462-1257 number and provide the conference code followed by the # button. If people outside the team are connecting, they can connect by dialing (608) 265-1001, provide the conference code and pay their own long distance charges. People calling into a teleconference can dial in anytime after 15 minutes prior to time of call.

**2) Schedulers must notify Wisline of any cancellations at least 24 hours in advance to avoid costs.**

3) How to connect if all lines are in use: Call the Wisline troubleline locally at 262-3399 or 1-800-442-4614. State the name of the call you would like to join. You cannot be manually connected, therefore, you will be asked to call back to connect.

For more information and instructions on scheduling Wisline teleconferences, refer to this web site: <http://www.uwex.edu/ics/wisline/>

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## Attachment #2 – Reimbursing team expenses

The program area will support one two-day meeting or two one-day meetings a year for each team. Team members will try to cover as much of their costs as possible from other sources. The program area will pay lodging, if necessary, and on-site meeting expenses; team members will pay for their own travel expenses. Team meeting expenses will be processed through the CALS Associate Dean's office or the ANRE Program Area office. The staff at the CALS Associate Dean's office (Agricultural Hall) will process travel expenses for the Dairy, Forage, Fruit Crops, Grains, Nutrient Management, Risk Management and Vegetable Crops teams. Staff at the ANRE Program Leaders office (Extension Building) will process the reports for the Beef, Emerging Agricultural Markets, Farm Management Education, Food Industry, Land Use, Swine and Urban Agriculture/Horticulture teams.

### **Submitting travel/meeting expenses**

All team members should complete a state travel expense form for team travel/meeting expenses. The form should be filled out completely, except for funding codes, and sent to the appropriate team budget office. Please refer to the UW-System Pocket Travel Guide for lodging and meal maximums. The Travel Guide can be found at <http://www.uwsa.edu/fadmin/travel.htm>.

Following are some guidelines for submitting travel/meeting expenses:

- a) Mileage reimbursement: For county faculty/staff, the mileage reimbursement is .325 per mile. For campus-based faculty/staff, the mileage reimbursement is 0.325 per mile for round-trip mileage under 300 miles. For 300 miles or over, the rate is .22 per mile. If two or more people carpool with you, you can claim an additional .01 per mile as long as the carpoolers are on UW business. The driver, when submitting expenses, must include the names of the carpoolers when claiming more than the standard amount.
- b) Travelers must attach an agenda to travel expense forms for meetings with a registration fee. If you are claiming meals and mileage only for travel to a meeting, an agenda is not necessary, but you must describe the nature of the meeting and where it was held.
- c) If you reimburse a speaker for meals, lodging, or mileage, you must submit a Payment to Individual Report (PIR) form to your team budget office. Forms can be obtained from your campus or county

office, from the ANRE program office in Madison or printed from this web site: <http://www1.uwex.edu/gea/bussvcs/forms/>

- d) If team members are submitting team meeting expenses to their assigned team budget office, team leaders must provide an agenda and list of participants to that office.