

International Planning Retreat for UWEX Cooperative Extension

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This paper examines the recent effort by the University of Wisconsin Extension to plan for greater extension participation in international efforts. A variety of planning and facilitation tools were used to complete the strategic planning retreat - a diversity of interests matrix, windshield analysis, SWOT analysis, vision and mission statement development, and nominal group technique. To implement the plan goals were established: 1) to create a Team International; 2) to develop a scholarship context for international programs; 3) to develop institutional capacity and support to carry out international programs; 4) to provide staff training related to international work; and 5) to develop evaluation instruments that tout the benefit of international work or at least speak to the benefits. The author describes the relevance and efficacy of the planning process. He concludes by noting that UWEX extension administration is supportive of internationalization efforts but that resources are scarce for new program initiatives. Progress will be made first on those items with little or no costs. Outside seed funding and partnerships will be pursued to implement the goals.

Introduction

The University of Wisconsin Extension (UWEX) has a long history of involvement in international work. UWEX faculty members have strong skills, relevant for international extension work; interested faculty; and there is much we can learn from international groups and programs. In spite of this, UWEX international extension activities have been quite limited, especially from an institutional perspective. Extension administration in Wisconsin recognized the paucity of these efforts and in 2002 took some tentative steps towards expanding its involvement in international extension education. This paper and presentation will examine the recent effort by UWEX to examine and to promote greater extension participation in international efforts.

It is relevant to note that in 1965 all the outreach functions of the University of Wisconsin were combined to form a separate and distinct “virtual campus,” the University of Wisconsin Extension (White, 1965, p. 11). Cooperative Extension functions within this university, though in close collaboration with the University of Wisconsin Madison’s College of Agriculture and Life Sciences (CAL S). Most Cooperative Extension’s state specialists have split appointments between the two institutions with their academic homes in CAL S. (<http://www.uwex.edu/about/history.cfm>, 3/19/03). Finally, UWEX for this paper should be considered synonymous with the cooperative extension unit.

Check APA citation rules---Albrecht, Crave, and Havlovic, Wisconsin extension professionals, in their presentation at the 2001 Outreach Scholarship conference, noted that international work helps locally in two important ways: “it increases our sensitivity to cultural differences which can help us deal more effectively with differences in Wisconsin and it challenges our conventional methods of teaching and learning.” The 1998 NASULGC’s International Agriculture section report stated, “We urgently need to find ways to increase the level of engagement of our resident teaching faculty, research scientists, and Extension agents in addressing the global dimension.” Both these perspectives highlight the important role international activities can and should play in our extension work.

Clearly Extension has much to benefit from an increased international presence. However, nationwide there is not a high level of involvement in international activities. Ludwig, in her August 1999 Journal of Extension article, investigated the barriers to participation in international work for Ohio State Extension staff. The top three barriers she identified were: a lack of time, not a programming priority; and a lack of experience. These same reasons no doubt impact UWEX faculty and staff and their international involvement.

The current international work situation of UWEX can be characterized as:

- UWEX Cooperative Extension currently has a working policy on international issues, but no mission, vision, goals, or action plans.
- The majority of UWEX’s international work is with core “internationalists” who have significant international experience and are professionally and personally motivated to contribute in this sphere.
- Other UWEX staff members, with perhaps more to gain and share, have had a limited role to date in our international work.
- For the institution, that international work has not been a high priority is evidenced by a lack of training, orientation, or work being done.
- There has been little systematic attempt to capture range of work done, results, or opportunities.

For these reasons, the Dean's office and the combined international committee of the Wisconsin Chapter of Epsilon Sigma Phi (an honorary and extension educational fraternity) and the UWEX International Committee proposed an international planning retreat. The purpose was to examine UWEX's international efforts and intentions. This retreat was held in late October, of 2002 at the University of Wisconsin Stevens Point.

Purpose of Paper

The purpose of this paper is to analyze the results of the international extension planning retreat. It is hoped that both the retreat process and the results will be useful to other extension services considering greater global engagement, particularly for those institutions that are not naturally connected to their land grant institutions. Specifically, this paper focuses on: the planning methodology; the key findings by the participants; identification of the top group goals; tentative action plans for the goals; and offers conclusions on the need for future action.

Methods and Procedures

The retreat and the analysis used a number of methods, most of them well known within group facilitation. The methods used for developing, conducting, and reviewing the results of this strategic planning retreat are described below.

Diversity of Interest Matrix

With Ellen Fitzsimmons, the Associate Dean for Wisconsin's Cooperative Extension, a diversity of interests matrix was developed. This was designed to ensure well-rounded participation in the planning retreat and that an array of interests and concerns were heard. I developed the matrix and then sought to utilize it in recruiting participation in the retreat. We included the potential participants' programming background, years of extension experience, gender, international experiences (non Extension and Extension), and their regional international experiences as the main categories of interest. We asked people to self categorize their interests and experiences. Again, the purpose was to have an array of interests and experiences at the retreat and to make certain that core "internationalists" didn't predominate in the discussions.

Brainstorming and Windshield Analysis

At the retreat an initial tool was used to raise the level of awareness of international activities amongst the staff. In this exercise we asked the participants to list the highlights of our cooperative extension international programming over the past five years. It is a form of brainstorming organized around the question, "What we have seen of international programming if we drove the terrain over the past five years?" We also asked all the organizations through which Wisconsin Extension staff participated in international programming.

SWOT Analysis

SWOT analysis can be simply understood as the examination of an organization's internal strengths and weaknesses, and its environments, opportunities, and threats. It is a general tool designed to be used in the preliminary stages of decision-making and as a precursor to strategic planning in various kinds of applications (Balamuralikrishna and Dugger, 1995, p. 1). This method provided the planning group with basic information about the context and the organization as it related to international work.

Vision Statement

A vision statement is a shared picture of the future we seek to create (Peter Senge, *The Fifth Discipline*, 1990). To develop a vision statement for our international work, each participant was asked to complete the following sentence and then to share it with the group: UWEX Cooperative Extension international efforts will be _____. Afterwards, a draft was approved by consensus.

Mission Statement

A mission statement describes the direction and purpose of a group or organization. An effective mission statement is short and to the point, lets people know how they fit in; is non-technical, provides a focus, indicates impact and outcome, makes the group distinct, is philosophical in a practical sense, and includes key descriptive words that are unique to the organization (Anderson et al, *Facilitation Resources*, Volume 3, 1999, p. 16). To develop a mission statement for our international work, each participant was asked to complete the following sentence and then to share it with the group: The purpose UWEX Cooperative Extension international efforts will be _____. Afterwards, a draft was approved by consensus.

Nominal Group Technique

Finally, a Nominal Group Technique (NGT) was used to identify goals for the international group. "Nominal Groups are widely used as a means of identifying and priorities concerns, goals, or community issues," (Ohm, p. 9). . Goals provide the strategies and ideas to bring the vision and mission closer to reality. Like the mission, the organizational goals should be doable but also stretch the organization. For the purpose of this exercise the group defined their goals with a two year time horizon. To identify the goals a modified nominal group process was used. The full group divided into two smaller groups to brainstorm for possible goals. After identifying their goals, the lists were shared and similar goals combined. Finally, each participant was given five points to vote for their top priorities.

The information gathered at the retreat was summarized, sent out the group for a review, and then released to the rest of the institution. The report forms the bulk of the results section of this paper.

Results

Diversity Matrix

A variety of people participated in the retreat. Thirteen people, representing all the program areas, an equitable gender mix, varying degrees of international experience, and representative of an array of international experiences took place. I would judge that we successfully broadened the retreat participation beyond the core “internationalists” through this approach. It is worth mentioning, however, that recruiting people for the retreat, particularly those with limited international experience was a challenge.

Windshield Analysis

UWEX is currently engaged in a broad range of international organizations:

- Participation in Nicaraguan programs through Partners of the Americas
- Participation in the Farmer to Farmer programs
- Designing and leading international experiences through the Wisconsin Rural Leadership Program
- Participation in the WRLP, generating resource materials and international connections through WRLP
- Training of Russian professionals through US sponsored Russian training programs
- 4H international programs expanded to include Japan, NIS, Mexico, and South Korea
- Hundreds of student exchanges through the 4H international programs
- A large assortment of professional consultancies and volunteer experiences with a large assortment of organizations (see following section for partial listing)
- Leading Wisconsin dairy producers to Mexico for training programs
- Design and teaching in Nicaraguan municipal officials training
- Design and teaching in Nicaraguan leadership program
- Scholarship paper presented on UWEX International work experiences at 2001 Outreach Scholarship Conference
- Domestic training on tools for international work (ie Rapid Rural Appraisals)
- ESP supported training of UWEX staff in Spanish
- Support of Hmong 4H clubs
- Active participation in TC110 program (historical)

The analysis also pointed to a number of organizations that UWEX or its staff, as volunteers, has collaborated with in their international work: Agricultural Cooperative Development International/Volunteers in Overseas Cooperative Assistance Volunteers; CNFA; Land O'Lakes; Global Citizens; Global Volunteers; USDA - Foreign Agricultural Service, Disaster agency, and CSREES international programs; Friendship Force; 4H Programs - Adult chaperones, Internships; Professional Associations; and Rotary International

One conclusion was that there are already a variety of opportunities for international outreach, but most are little known to the majority of people in the institution. A second

conclusion, offered by Mike McGirr, CSREES International Programs, is that USDA programs, and CSREES in particular, were not cited by many.

SWOT Analysis

In analyzing the internal environment a number of strengths and weaknesses were discussed (see summary information in Table 1).

Table 1
SWOT Analysis - Internal Environment

Strengths	Weaknesses
<ul style="list-style-type: none"> ■ We're educators ■ We have a lot to offer – technical expertise ■ Our knowledge matches need ■ Adaptability to community needs ■ We have credibility, nationwide, in extension ■ We have people with Peace Corps overseas experience ■ Our public policy approach provides big picture relevant to community development ■ We're a learning organization ■ We have key people who have supported international work, over time ■ Our mission meshes with international development work ■ Extension credibility worldwide ■ People want us ■ We want to participate, we're committed 	<ul style="list-style-type: none"> ■ There's a lack of time ■ Complications with defining our use of time ■ Not defined as a priority ■ Risk may be liability ■ Unequal defining of how to use time ■ County resources may also be scarce ■ Domestic economic conditions make it more difficult to support international work ■ Lack of funds ■ Political perspective may limit support ■ Lack of organizational networking w/in UWEX for international work ■ Inconsistent support for staff ■ Little scholarship on issue ■ Lack of shared expectations and understanding ■ Actions and people involved are spread across state and system ■ Insufficient marketing of local benefits

The examination of the external environment also revealed the groups' perceptions of their opportunities and threats (see Table 2).

Table 2
SWOT Analysis - External Environment

Opportunities	Threats
<ul style="list-style-type: none"> ■ Personal Experience ■ North Central Regional learning ■ Professional growth ■ Multi-state cooperative experiences for novices ■ Changing demographics ■ USDA national initiative ■ Diverse expertise and niches ■ Federal funds, potential growth ■ USAID refocusing on agriculture again ■ Learning language ■ Already established groups ■ Internet ■ Recognition of globalization ■ There are places interested in the development of Ext Services and our experience ■ DPI state standards 	<ul style="list-style-type: none"> ■ Family Obligations ■ Terrorism security ■ Concerns about liability ■ Lack of support from stakeholders ■ Health concerns ■ Gender issues ■ Language barriers ■ Increasing competition for funds ■ Use of public funds (county and state) ■ Pre-conceived notions about “helping”

Through the SWOT analysis it became clear there were many positive reasons to proceed ahead with strengthening our international programs. At the same time, the group recognized that federal, state, and local budgets were going to make it difficult to greatly increase our international programs. However, modest amounts of internal funding could be leveraged with outside sources to increase our international work. We can also increase the international dimension of our work, in a variety of ways, with little additional cost.

Mission Statement

A number of themes emerged from the mission statement work.

- There will be local benefits and impacts through strengthened international understanding
- There will be local, institutional, and international partnerships
- Will be recognized as a vibrant and credible organization able to work on a global scale
- Will be recognized as offering significant opportunities for all staff

- As an institutional supported two-way partnership with a variety of countries to improve global understanding and quality of life for all involved
- Will do good works, will make a difference
- Will be vibrant, not static
- Pro-active in seeking out opportunities for staff and opportunities to assist
- Will seek to improve the quality of life for people in Wisconsin and the world.
- Will include Innovative, multi-dimensional efforts, involving mentoring partnerships with credible international agencies

From this work a draft vision statement was developed and approved by the group through a consensus approach: *UWEX Cooperative Extension will have a focused, vibrant, and active international program, linking Wisconsin to the world to benefit our staff, communities, and our international partners.*

Mission Statement

Major themes also emerged from the mission statement exercise. These include:

- We should utilize Extension philosophy and model
- Partnerships are important
- The approach should respect local knowledge and culture
- The efforts should be needs driven
- It should be of benefit to the people of Wisconsin
- It should benefit the staff
- It should benefit the international community
- There should be clear institutional support for the international efforts, even if modest
- Adaptability is important

From these many themes, a possible mission statement for UWEX was drafted and approved by consensus: *The purpose of UWEX Cooperative Extension international efforts is to contribute to the improvement of Wisconsin and international communities through the sharing of expertise and experiences.*

By way of comparison, “The mission of International Extension Programming at Michigan State University is to enhance international, multicultural and technological competencies for informed participation in global affairs.”

UWEX International Goals

A vision and mission can provide a focus on the future and a purpose. Goals provide the strategies and ideas to bring the vision and mission closer to reality. The top five goals are cited below, followed by the complete list from each group (Tables 3 and 4).

Top Goals

- **Create a Team International with designated leadership**

The current UWEX program planning structure includes a series of teams, each with responsibilities for program planning and development and reporting. The teams are made up of specialists and agents. They have limited budgets for meeting and are empowered to not only develop programs but to pursue additional funds. Finally, the program planning structure provides staff with a place to report their accomplishments. Through the implementation of this goal, Cooperative Extension will embrace international work as a part, albeit limited part, of their mission.

- **Develop and maintain a scholarship context for international programs**

Since the late 1990's UWEX has had a strong interest in developing the scholarship aspect of their work. One way of furthering our understanding of the dimensions of international work and to demonstrate our understanding of it is through such scholarship. This goal is a call to develop structures within Extension to promote research and sharing of knowledge on the internationalization of extension.

- **Develop institutional capacity and context to carry out international programs and to support staff in this work**

UWEX needs to improve their understanding of working internationally – both in terms of our staff overseas and in receiving internationals. This includes stronger institutional commitment to international work, clearer policies and procedures, a higher profile by our leadership team, and in pursuing international funding opportunities related to extension development, when appropriated. Also noted was developing a set of web pages to coordinate and organize the international endeavors of UWEX. This site would also link to other state's international programs and organizations offering international opportunities. More ambitiously, this can also include developing venues for international study/travel programs like Florida's or Missouri's. Multi-state programs might be tried.

- **Provide staff training related in international work**

As part of an overall plan to “ramp up” our involvement in international work, a series of training needs were identified. This included, identifying our relevant professional assets and strengths with respect to international projects, language training, cross-cultural training, home institution advice (i.e. don't promise the moon), international travel “survival” tips, tips on planning to be away and coming back, tools for successful international development work (i.e. Rapid Rural Appraisal), project development basics, telling the story back home, and integrating overseas' work with local work.

- **Develop evaluation instruments that tout the benefit of international work or at least speak to the benefits**

The participants recognized the continual need to tell the story of the relevance and benefits of “internationalizing” cooperative extension to partners and local stakeholders. Two gaps, were noted however on delivering on this need. First, there is insufficient information to document the overseas impacts or the possible domestic impacts of international work. Second, there is not a communications strategy to effectively tell the story. The group guessed that this might be a regional and national concern.

Table 3 - Goals for Group I	
1.	Designate leadership for international programs be recognized by administration and colleagues
2.	Include a reporting component for our international work
3.	Encourage cross programming for our international work
4.	Provide training for our international work
5.	Provide clear guidelines concerning time commitments and other issues for international work
6.	Have a well communicated international program
7.	Provide good communication on international opportunities
8.	Develop a team website for international programs
9.	Provide assistance for staff to communicate about their international assistance locally
10.	Prepare a training module for staff on international work and expectations
11.	Become part of extension’s and other organization’s international networks
12.	Enable program follow up on impacts of international work
13.	Collaborate with other entities on projects
14.	Provide a group experience to learn more about global perspectives
15.	Develop as benefit to attract people to Extension

Table 4 - Goals for Group II	
1.	Designate a lead person for international programs
2.	Develop tools or workbooks to guide in the preparation and post trip experiences, including websites
3.	Identify contacts with partners
4.	Provide training
5.	Develop institutional capacity and context to carry out international programs and to support staff in this work
6.	Find resources to support international efforts
7.	Develop and maintain a scholarship context for international programs
8.	Develop evaluation instruments that tout the benefit of international work or at least speak to the benefits
9.	Provide formal and informal recognition for international work.
10.	Encourage and promote language training
11.	Include elements of international training in diversity training
12.	Establish a team plan of work for international programs
13.	Develop a communication’s network with key contacts identified within the state

Conclusions and Implications

Following the retreat the planning group discussed the next steps for their work. The UWEX/ESP International Committee was heavily represented at the retreat, but others in the institution also participated. Together, all will be needed to make progress on the goals mentioned. The group also believed it was important to note that some goals may take additional resources while others can be addressed without additional funds.

The group agreed to the next steps:

1. The results will be presented to the Dean, the UWEX Administrative Committee, and the UWEX International/ESP Committee. It will be shared with the partners who assisted during the retreat (USDA CSREES International Programs, MSU Extension International Programs, and Wisconsin – Nicaragua Partners).
2. We will seek approval for our plans from Extension Administration.
3. The results will be shared institution-wide.
4. The UWEX/ESP International Committee will work in their early 2003 meetings to develop actions plans for the top five goals. The other goals will also be analyzed to see if some can be implemented quickly.
5. John Preissing, the UWEX Cooperative Extension International Liaison, will maintain contact with USDA CSREES International Programs on partnership and new seed money grant initiatives that may occur.

The Dean and the UWEX administrative group have now approved the goals and general strategies outlined in the report. Due to the financial stress in Wisconsin there was a reluctance to allocate new monies today to implement the goals, however, future support is possible. The committee was empowered to develop and implement action plans on those items are no cost or low cost and to pursue partner funding to implement this plan.

Presenting the results at the national conference in the spring of 2003 is also planned. It hoped that the dialogue at the conference and sharing will help point to ways that UWEX can more effectively realize their goals of internationalizing extension.

The planning process was useful in terms of raising awareness in UWEX as to the possibilities with international work. It also helped to develop a more cohesive group of people interested in the international mission beyond the “internationalists.” The diversity matrix was a useful tool in ensuring there was a broader grouping of participants at the retreat.

The support of administration was important to raising the profile of this work. Initial financial support for the retreat, the active participation of members of the administrative team, and approval of the plans are visible signs of the support. However, resource reallocation, internal staff support, and effective partnerships will all be needed to achieve the goals set out by the ESP/International Committee.