

Module 8: Communicating Value

The goal of this module is to learn how to create a respectful, trusting, supportive and productive work environment.

In this module we will address:

1. The preferred culture of Cooperative Extension
2. Definitions of politeness, civility, courtesy and respect
3. Barriers and bridges to effective communications
4. Creating your department's ground rules for effective communication
5. Listening in a focused, attentive manner
6. Improving abilities to provide credit
7. Giving and receiving feedback
8. Improving abilities to manage conflict

Section 1: The preferred culture of Cooperative Extension

The culture of an organization consists of its vision, values, management philosophy and climate. UW Cooperative Extension's vision is to be Wisconsin's first-choice educational network for engaging people and their communities in positive change. Extension's values include:

Applying research to solve local problems

Holding ourselves accountable for the highest standards of scholarship

Respecting the indigenous knowledge of the people we serve

Excellence and innovation: Exploring new approaches to meeting educational needs and holding ourselves to the highest standards for program quality and effectiveness.

Creating and maintaining partnerships including county, state and federal governments, private and public organizations, campus and county faculty and staff and volunteers.

Honesty and Integrity: Serving as good stewards of public trust and resources

Seeking diversity in our faculty, staff and clientele and welcoming differences in people, ideas, programs and partnerships.

Continuing a local presence in communities.

Managerial-Leadership Philosophy

Our managerial leadership philosophy at UW Extension includes the expectation that leaders at all levels will carry out their functions according to the following core values:

1. honesty (trustworthy, truthful, reliable)
2. competence (capable, qualified, skillful, effective)
3. broad-mindedness (open, flexible, receptive)
4. dependability (reliable, conscientious)
5. supportiveness (helpful, championing, comforting)
6. forward-looking (visionary, future-oriented)
7. fair-mindedness (just, objective, unbiased)

All departments should also provide faculty and staff with the resources necessary to carry out their programming functions and provide opportunities for all faculty and staff to achieve personal and professional growth.

County department heads are expected to encourage faculty and staff to work with them collaboratively and harmoniously to ensure departmental effectiveness.

County Extension departments are to foster creativity, innovation, high morale, teamwork, shared leadership, responsibility, and accountability for all members through work climates.

Section 2: Definitions of politeness, civility, courtesy and respect

For Cooperative Extension to fulfill its vision and live out its core values and managerial-leadership philosophy, each department needs to create and sustain a climate marked by both high productivity and high morale. Professor Ed Schein, the renowned professor of organizational behavior, once said that if “a group or organization is not able to manage its internal interpersonal relationships in a positive and productive manner, then the group or organization will not be able to build and maintain itself as a functioning entity capable of achieving its potential.” Research has shown that such functional climates are marked by politeness, courtesy, civility, and respect. What do those terms mean?

Politeness: Being duly respectful or indulgent with other people according to social norms.

Courtesy: A voluntary, helpful consideration

Civility: Being friendly in a reserved correct sense

Respect: To feel or show deferential regard for, to avoid violation of or interference with others, willingness to show consideration or appreciation

Section 3: Barriers and bridges to effective communications

Great departments—those that are marked by high productivity and high morale—are places where excellence in communications abounds. But what is communication, what are its elements, and what are some of the barriers and bridges to effective communications?

Communication is simply the creation of understanding. Please see Appendix C. As you can see, it requires not just a sender but also a receiver. The message sent must be understood as intended.

For effective communication to occur, one also has to control noise. The noise can emit from the sender. He or she may not have a clear idea; may be oblivious to the audience's language level, needs and wants; may not care if the receiver interprets the information correctly; or may not carefully plan the communication to get positive results.

The noise may also emit from the message. The content may be poorly organized, impenetrable, or contradictory; the tone may be condescending, arrogant or wishy-washy; the attitude of the speaker may be harsh, rude and sarcastic.

In addition, the noise can emit from the channel selection. Perhaps, the words and the gestures contradict one another. You've been in conversations in which the words said, "Yes," but the body language screamed, "NO!!!!!" Perhaps, the sender selected the wrong medium for the message, using, for example, inflexible e-mail to resolve a conflict with a peer.

The noise can emit from the receiver as well. He or she may not be paying attention to the sender, the work environment may be noisy and prevent understanding, or the receiver may be distracted.

Noise can also occur when the listener does not ask questions for clarification, for example, of terms, deeper meanings or vague statements.

The most important contributor to misunderstanding, however, is the noise that is implicitly contained in word usage. Each of us has our own specific meanings of every noun, verb, adjective and adverb in our language. We develop our meanings through personal experiences. If receivers don't go through the exercise of putting the message into their own words and feeding them back to the sender, misunderstanding can easily occur.

Lastly, noise can emit from the feedback the receiver gives to the sender. It may be nonexistent, delayed, vague, dishonest or inappropriate.

To eliminate these barriers to effective communications, people do the following:

As a Sender:

1. Understand the audience(s) language and needs
2. Use the “you” attitude, putting the audiences first
3. Clarify for themselves the idea, purpose, and desired end result
4. Be strongly motivated to create clear understanding
5. Plan the communication thoroughly (please see Attachment #2 for a useful template)

As a Receiver, effective communicators—

1. Attend to the other
2. Minimize external and internal distractions
3. Ask appropriate questions
4. Assign approximate meaning
5. Paraphrase what they hear the other saying—put it in their own words

Lastly, effective communicators send Feedback that is marked by—

1. Timeliness
2. Specificity, concreteness, clarity

3. Honesty
4. Politeness, courtesy, civility, respect

Please see Appendix D for some exercises that will help you clarify critical points about communications.

Section 4: Creating your department's ground rules for effective communication

A tool that departments across Cooperative Extension use to create and sustain climates marked by politeness, courtesy, civility and respect is called "Creating Ground Rules for Communication." An example is provided in Appendix E.

This simple, effective process includes:

1. Identifying desired goals
2. Brainstorming effective ground rules
3. Rating level of importance
4. Establishing plan to maintain awareness of the group's efforts

The process works this way:

1. Schedule at least 1½ hours for all group members to participate. Pick a time and day to maximize participation. It is best to have a facilitator who is not a member of the group.

2. The facilitator will be responsible for running the meeting.
3. Task #1 is to come to agreement as to how decisions will be made by the group: e.g., unanimous, consensus, majority rules, the director rules. It is recommended that the goal be consensus, with majority rules as a fall back. This, however, requires that the minority(s) believes they had the opportunity to be heard, were understood, and that their views were honestly considered.
4. The group should then agree on their goals. Come to consensus on where your department currently is in terms of politeness, courtesy, civility, and respect. Come to consensus on where your department needs to be.
5. The group should then brainstorm ideas for ground rules.
6. When the brainstorming is completed, the proposed rules should be evaluated as to the relative importance of their desired outcome.
7. The group should then seek consensus on which rules should be their working standard.

8. The final list should be formally adopted including each member signing their name indicating their willingness to comply and help each other maintain the standards they have adopted.

9. It is recommended that a reading of the ground rules take place at every formal meeting of the organization.

10. Create an evaluation form for ground rules (see the earlier example)

Section 5: Listening in a focused, attentive manner

As described earlier, listening well is not an innate trait. Like all other skills, it can be broken down into a set of behaviors that need to be repeatedly practiced to be mastered. Here, we describe verbal and nonverbal behaviors that help and hinder effective listening, four skills in responsiveness that promote active listening, and a practical exercise that you can use to improve your ability to listen with understanding to others.

The following helping and nonhelping verbal and nonverbal behaviors come from studies and instruction in counseling psychology (Barbara Okun, *Effective Helping: Interviewing and Counseling Techniques*. North Scituate, Massachusetts: Duxbury Press, 1979). As you read through the following, ask yourself: “To what degree do I practice these behaviors when I am interacting with others?”

Helping Behaviors

Verbal

uses understandable words

reflects back and clarifies what the other is saying

appropriately interprets

summarizes for the other

uses verbal reinforcers: “mm-mm,”

“I see,” “Yes”

calls the other by his or her first name

uses humor occasionally to break the tension

is nonjudgmental

adds greater understanding to the statements of the other

phrases interpretations tentatively to elicit feedback

Non-Verbal

uses a tone of voice similar to that of the person needing the help

maintains good eye contact – no glaring or staring blankly

occasionally nods the head

shows some facial animation

positions self close to the other

occasionally smiles

uses a moderate rate of speech

leans in toward the other

Most important of all of the above are being nonjudgmental and maintaining appropriate eye contact. Maintaining appropriate eye contact is the most important nonverbal behavior in our culture. The good listener's eyes are wide open, relaxed, focused, warm, and smiling, inviting the speaker to continue. Looking away from the other person as he or she is speaking, rolling of the eyes, staring blankly into space, glaring at the other are all signs of disinterest, nonconnection, or a threatening demeanor, all alienating the speaker. One major purpose of active listening is to build bonds of trust between the sender and the receiver. Being judgmental and using one's eyes as weapons destroy trust and build social distance.

Again, as you read through the following list of nonhelpful behaviors, ask yourself the question, "To what degree do I practice these behaviors when I am interacting with others?"

Nonhelping Behaviors

Verbal

advice giving

preaching

placating--soothing, mollifying

blaming

cajoling--to persuade with deliberate

flattery

exhorting--urging strongly

extensive probing and questioning,

especially "why" questions

directing, demanding

distracting gestures

using words the other doesn't understand

straying off the topic

too fast or too slow rate of speech

intellectualizing

overanalyzing

talking about self too much

Non-Verbal

looking away from the other

sitting far apart or turned away from the other

physical sneers

scowling

tight mouth

shaking or pointing finger

yawning

closing eyes

Listening Skills

Four listening skills deserve special attention: reflecting, paraphrasing, clarifying and drawing out. Here are some explanations of these skills.

Reflecting: Restating as exactly as possible what another person has said. The opposite of reflecting is ignoring or judging.

Paraphrasing: Attempting to restate a speaker's lengthy or complex statement in his or her own words. The opposite of paraphrasing is challenging.

The ability to listen, and to demonstrate you have heard by reflecting or paraphrasing, are significant skills because they promote feelings of acceptance and understanding necessary for effective communication.

Reflection and paraphrasing are most useful when the speaker has stated relatively clearly and fully what he is thinking or feeling. Sometimes, however, even though the listener has accurately heard the speaker, he does not understand what the speaker means or he senses that the speaker may be trying to say more or less than what she actually has said. In these instances, it may be necessary to clarify what the speaker has said and to draw her out.

Clarifying: Here, the listener asks clarifying questions to understand what was said. Such questions can be either open-ended or closed-ended. Interpreting is the opposite of clarifying.

Drawing Out: Here, the listener encourages the speaker to expand what she said. Drawing-out questions may ask about the central idea of what is said or about the non-verbal cues given by the speaker. Sometimes silence can be used effectively to encourage speakers to expand on their comments. Listeners also find effective the use of the simple expression, "Please tell me more." The opposite of drawing out is projecting values.

Excellent listening affords all of us the opportunity to build bonds of trust, respect, appreciation of diversity, and personal growth. For an exercise on active learning that can be used by everyone in your department, please see APPENDIX F: This is Your Life Interview.

Some people say that they don't ever have enough time at work to do such interaction. We challenge that by suggesting that once every two weeks, eat lunch with a different person at work and conduct such a conversation. Active listening to your peers, colleagues and clients compared to many other department activities can be one of the best means to promote a work climate marked by high productivity and high morale.

Section 6: Improving abilities to provide credit

Another tool that people use to create more productive and happier workplaces is crediting, or positive reinforcement. B.F. Skinner, the renowned behaviorist psychologist, like his predecessors Pavlov and Watson, stipulated that behavior is determined by its consequences. That is, if a person performs an act and then is rewarded for that performance, the person will generally repeat the performance. On whole, people are pleasure seekers and pain avoiders—we seek rewards that help us further our objectives.

For positive reinforcement to work well, the praise must be earned, timely and individualized and the giver of it must be sincere and specific.

Unearned praise given by a distrustworthy sender does a lot more damage than no praise at all. Thus, ensure that the receiver deserves the reinforcement and that you deliver it with sincere, honest intent, politely, civilly, courteously and respectfully.

Secondly, much of the praise given in workplaces is too general to be really useful. What, specifically, comprises a “Good” job? What’s “Excellent”? Thus, ensure your praise mentions specific facts regarding the actual performance of the receiver—timeliness, quality, quantity, reduction of waste, happiness of clients, etc.

Third, if you provide praise too long after the performance, its positive effects diminish. Giving positive reinforcement only during annual performance review makes it seem ritualistic and dishonest.

Lastly, not everyone wishes positive reinforcement be given in the same way. Some people love public praise, their name in lights; others would die if they were singled out in public. Give praise privately unless you know for sure the receiver desires a public venue.

A Method of Giving Credit

Here is a simple formula that you can use to provide positive reinforcement at home and at work:

Make a *general reference* to the performance being credited.

Sincerely *thank* the person.

Give *specific examples* of the performance.

Mention the *personal qualities or competencies* that led to the performance.

Mention the *resulting benefits* to the department or organization.

Forms of Rewards

Different people desire different rewards. An inappropriate reward is often never forgotten just as an appropriate one can be cherished forever. Examine the

following possible rewards and examine how the people in your sphere of influence would respond to each. For each item ask:

Do you have it under your control or can you get it? If your answer is "No," delete it

Would it be reinforcing for that person or group?

Letter of commendation

Asking person for advice or opinions

Verbal praise

Letting the person report her results to upper management

Increased responsibility

Allowing a person to make decisions affecting his work, organization, strategies, or plans

Memo to superiors on performance of subordinates with copy to subordinate

Passing along compliments from others

Choice of tasks

Put positive information into personnel folder

Remove constant supervision

Early start on vacations requirement

Represent department at meetings

Time off

Training for a better job

Additional help

Talking to person about something she is interested in

Work on special projects

Help you in some of your duties

A “thank you,” a nod, a smile, a handshake, a pat on the back

Personal phone call or note from you

Flexibility in work scheduling

Promotions

Raises

Flex time

Fringe benefits

Gift certificate

Plaques, trophies, diplomas

We’re sure you can add to this list. The best way to determine what reinforces the receiver would appreciate is to ask the person or someone who really knows the person well.

Section 7: Giving and receiving feedback

Another tool that good communicators use to help enhance the climate of a department is constructive feedback.

As with most other types of communications, for feedback to be used effectively, it must be earned, honest, specific, timely and respectfully delivered.

A Process of Providing Constructive Feedback

1. Listen to the suggestion or observe the performance.
2. Give an itemized response: Specify merits and concerns
3. Identify ways to retain merits and reduce or eliminate concerns:
Invite/make suggestions; Give/invite reactions
5. Summarize suggestions/steps agreed upon.

Guidelines for Receiving Constructive Feedback

Resistance to feedback is often caused by: fear of attack, our early upbringing, negative experience with people we perceive as hurtful, etc. Some suggestions to allay our fears and open ourselves up to helpful feedback include:

1. Approaching the situation with an intent to learn rather than protect.
2. Resisting the instinct of feeling personally attacked
3. Not denying the feedback
4. Not defending yourself
5. Not justifying yourself
6. Not arguing
7. Not saying, "yes but"
8. Repeating back in your own words the message you heard
9. Asking the person to be more specific. The intent for doing this is to gather more relevant data which will help you understand what, why, when and where the desired behavior is expected of you.
10. Offering or asking for a solution for addressing how to close the gap.

Section 8: Improving abilities to manage conflict

The realities of today's office environment include conflict between individuals and units. In this section, you will find information on the causes of conflict, some enlightened assumptions about conflict, and helpful tools to use when managing conflict in your personal and professional life. This section is placed last in the module because it is built on all that has gone before it. To manage conflict well, you need to be able to send appropriate and clear messages, listen with your eyes and ears, and give and receive constructive feedback.

Causes of Conflict

Two types of causes can readily be identified; some of the items overlap. You can use the following causes to analyze a conflict that you or your department is currently experiencing, the idea being if you can identify the root of a conflict, there is a better chance for resolution.

Organizational

1. **Task Interdependence.** When units within an organization depend upon one another for information, resources, time, money, people, etc., conflict is inevitable. Coordinating and sharing resources is difficult. The more interdependent the units are, the greater the potential for conflict.

2. Shared Resources. All organizations have limited resources. The greater the squeeze of time, money, facilities, people, etc., the higher the potential for conflict.
3. Goal Incompatibility. Units often have different goals. For example, clients might demand more services while the county wishes to slash budgets. Units may also have different standards. For instance, quality assurance wants the goods to meet all the specs, but sales wants to ship them “as is” and send the revised software later. Conflict arises to the extent that goals or standards are incompatible.
4. Differentiation. Units develop their own ways of doing things: policies, procedures, norms, management styles, etc. To the extent that these differ between units, the potential for conflict is higher.
5. Uncertainty. Most organizations work in changing, turbulent environments caused by new technologies, new customer demands, new regulations, shifts in the economy, etc. Coping with these changes creates stress. The greater the changes, the greater the potential that the people will see themselves as losing rather than winning. Win-lose situations create conflict.

6. Reward Systems. Organizational incentives often cause conflict between units. If one unit is rewarded for the attainment of goals at the other unit's expense, competition rather than cooperation is fostered.
7. Jurisdictional Ambiguities. When job responsibilities between units are unclear, conflict will result.
8. Communications Breakdowns. Poor communications, intentional or unintentional, usually result in misunderstandings and misperceptions between units. Mistrust and conflict increase as communications break down.
9. Differences in Power or Status. High-status units possess more influence than do those of lower status. Conflicts arise when low-status units resist being influenced or try to increase their power at the expense of higher-status units.

Interpersonal

1. Perceived Incompatibility of Self-interests. Parties believe that a win-lose situation exists; one person will gain while the other will lose. Conflicts arise when people perceive conflicts in motives, goals, aspirations and roles.
2. Perceived Scarce Rewards. Parties think the pie is not big enough for two.
3. Perceived Inequity of Rewards and Status. People are particularly sensitive to matters of equity, believing the rewards they receive should equal their contributions.
4. Differences in Self-Concept and Temperament. Conflict arises when person A's self-image differs from B's perception. For example, person A doesn't perform a task because she fears failure; person B thinks she is just lazy. Person A is extroverted, articulate, outgoing, preferring engagement; person B, introverted, quiet, thoughtful, preferring isolation. Both believe the other has problems. People differ in where they prefer to focus their attention and get energy, how they prefer to take in information, how they prefer to make decisions, and how they prefer to deal with the outer world.
5. Ego-Centrism/Obliviousness of Others. Some people falsely assume that they are the only ones right in their judgments about the world. People

differ in beliefs, values, priorities, norms, standards, methods and attitudes. Misunderstandings and disagreements are normal and can be resolved. Actual differences cannot be resolved unless one or both parties change. If they don't want to compromise their differences, they can at least agree to disagree.

6. Poor Communications. What person A meant to say and what person B understood often differ. People don't always agree on word meaning. Some senders are inarticulate; some listeners, oblivious. People are not equally informed and see facts differently.

7. Perceived Absence of Mutually Acceptable Alternatives. Person A wants to play music loudly in the front room; person B wants to study quietly there. Neither wishes to move. Perhaps no mutually acceptable alternatives exist or perhaps both parties are stubborn. Fistfight ensues, but conflict is not resolved.

Some Assumptions About Conflict

There are many causes of conflict that affect departments daily. The following assumptions provide a helpful, optimistic, courageous and realistic approach to dealing with conflict in the workplace.

1. Conflict and disagreement are normal in human relationships.
Because of different life experiences (upbringing, culture, education, previous experience in relationships, etc.), people see the world differently and most think that their view is correct. People are often in conflict because they do not understand the other's frame of reference; do not understand or share the same values, objectives, and priorities; or are competing for the same resources—attention, money or position.

2. Conflict may be a good thing.
Conflict provides an opportunity for people to recognize and value differences of opinion, open up their worldview, expand their perspective, and solve problems. It gives both parties the opportunity to learn, improve, practice tolerance and achieve satisfactory resolution of emotional tension.

3. A mutually acceptable solution can often be found. If one can adopt a “win-win or no deal” attitude and communicate in an honest, courageous, assertive, but considerate and respectful manner, people can move from disagreement to compromise to collaboration to synergy.

4. Any of the parties in conflict can contribute to its resolution if one takes personal responsibility and initiates communications.
- My contribution to relationships is under my control; the parts others choose to play are not under my control.
 - When I change, my relationships change.
 - Waiting for other people or situations to change so that I can change equals no change.
 - The way I am treated by others depends partly upon how I “train” them to treat me.
 - Risk-taking is part of change. I may be rejected.

5. Trusting behavior can evoke trusting behavior.

The principle of social reciprocity stipulates that we get back what we give to others. “What goes around, comes around.” If people want others to trust them, listen to them, care for them, respect them, etc. they must give trust and respect first.

6. Consensus and synergy are likely only when people choose to cooperate in a win-win relationship rather than compete. Sometimes one must accommodate; other times, one must compete with all you have. Some people feel they always have to compete, to win at all costs. When dealing with a battler on an unimportant issue, let him or her win to gather social credits for later use. When

dealing with a critical issue, stand for what you believe is right with everything you have. When it is over, let go and move on.

7. Some conflicts may never be resolved because of fear, rigidity, intolerance, anger, paranoia, disfunctionality, or other emotional or mental impairment. Most often it is best to sidestep others' negativity, sarcasm and malicious ridicule.

Communication Ground Rules for Conflict Management

Because conflict management is of such importance, it has its own set of communication ground rules. Above all else, both parties have to agree to have a face-to-face conversation about their disagreement. Without both parties agreeing to negotiate, the conflict will not be resolved. Second, before two people can even attempt to have a conversation about a specific conflict, we strongly urge them to review and commit to the following dos and don'ts. Sometimes, it is very helpful to have a facilitator help the parties in conflict by holding them accountable for following through on the rules.

To ensure effective communication, please confirm your agreement to follow these ground rules. The guiding principle is to approach communication with an

intent to learn rather than an intent to protect. Add to the list if you wish, but ensure that each addition is specific and realistic.

Be honest. Say what is on your mind

Be specific

Provide examples

Don't use the words "never" and "always"

Listen and paraphrase what you hear the other person saying

Ask questions to clarify what the other is saying

Maintain good eye contact

Focus on behavior the other person controls

Focus on one behavior at a time

Don't interrupt

Be direct but tactful

Use "I" instead of "You" statements

Don't ridicule, taunt, or be hostile or rude

Don't defend yourself by blaming others

A Process of Conflict Management: Stop, Start, Continue

A truly effective process to deal with a conflict that you are having with another is to use an approach that comes out of marital counseling. It's called Stop, Start and Continue.

1. Create/validate communication ground rules.
2. Each person writes one 3" X 5" card for the other, specifying--
 - One thing the person wants the other person to stop doing
 - One thing the person wants the other person to start doing
 - One thing the person wants the other person to continue doing

Note: No more than one specific behavior is to be written for each start, stop, and continue. That will prevent piling on. Also, the behavior must be under the control of the person addressed.

3. The pair starts, by first one of the parties providing the stop on his or her card to the other, listening for feedback, answering questions, and negotiating agreement. The receiver listens in depth, asks for specific examples, probes for deeper understanding and paraphrases what he or she hears the other saying. If the other is not willing to commit to stopping the behavior, then he or she must indicate his or her reasons for not being able to make the commitment to change.

4. The process continues with the other person providing his or her stop to the other, following the process in #3.
5. The process continues with the giving, receiving, negotiating and committing to the remaining starts and continues.
6. Cards containing commitments are then posted, reviewed often, and used by one another to hold the other accountable.
7. The parties and the facilitators debrief on the process and provide affirmations for the courage to care and to communicate.

APPENDIX B: Selected Bibliography

Clampitt, Phillip G. *Communicating for Managerial Effectiveness*. Second edition.

Thousand Oaks, CA: Sage, Publications, 2001.

Dana, Daniel. *Managing Differences: How to Build Better Relationships at Work and Home*. Wolcott, CT: MTI Publications, 1989.

Heyman, Richard. *Why Didn't You Say That in the First Place?: How to be Understood at Work*. San Francisco, CA: Jossey-Bass, 1994.

Jeffers, Kathryn. *Don't Kill the Messenger: How To Avoid the Dangers of Workplace Conflict*. Wausau, WI: Link Publications, 1996.

Jerome, Paul J. *Coaching Through Effective Feedback*. San Francisco: Jossey-Bass/Pfeiffer, 1994.

Reed, Warren H. *Positive Listening: Learning to Hear What People are Really Saying*.

New York: F. Watts, 1985.

APPENDIX A: Module Team

Michael Perkl, Team Leader

Members:

Bob Cropp

Mike Hallenbeck

Brenda Janke

Tim Jergenson

Deb Jones

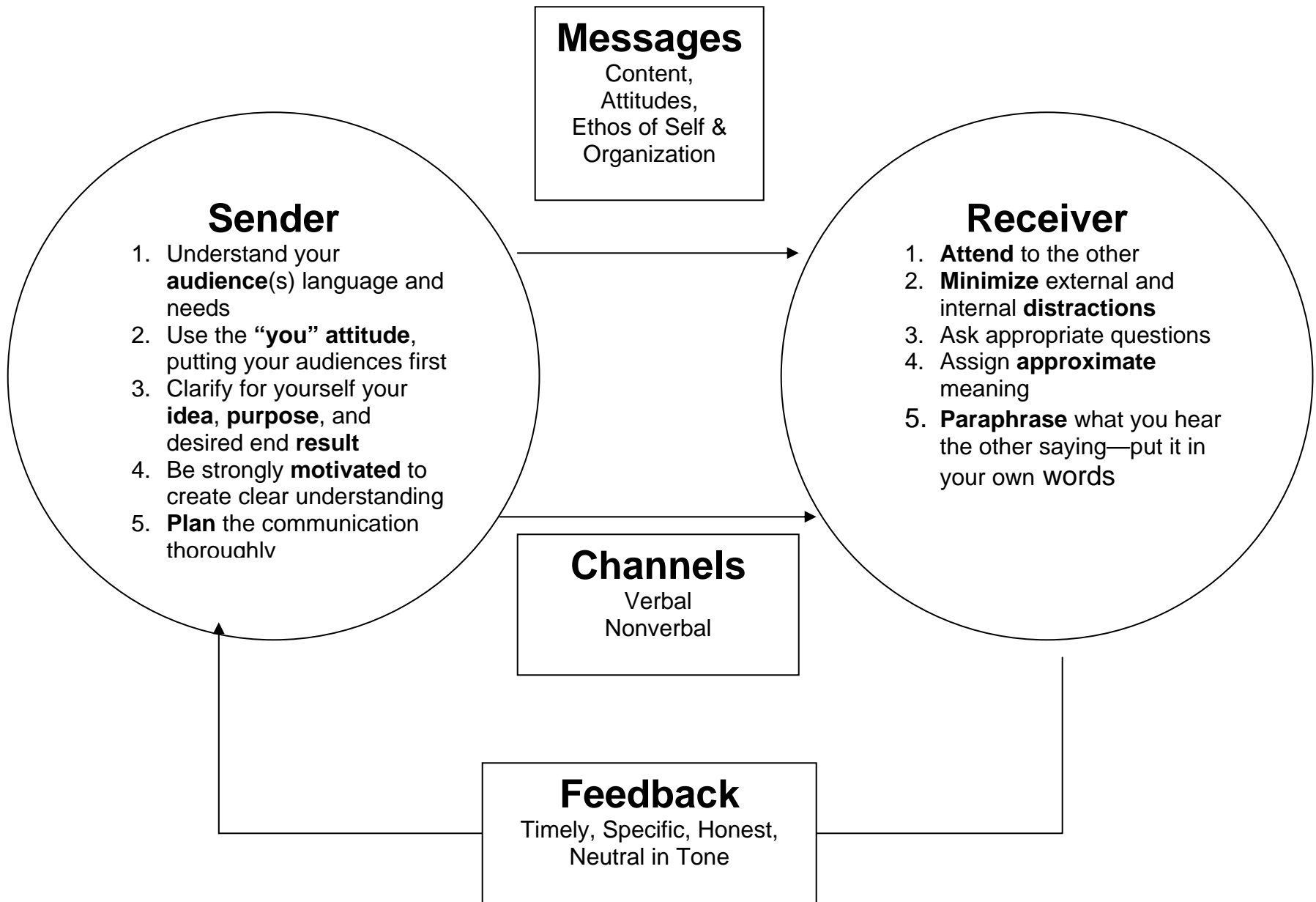
Buck Joseph

Ann Keim

Donna Menart

Shelly Tidemann

Appendix C: Communication...The Creation of Understanding



Section 5d: Bibliography

The Communications Handbook, Tools, Techniques and Technology, Agricultural Communicators in Education, Maupin House, 1996.

William Boldt, "Creative Marketing," *Case Currents*, December 1994.

Robert A. Sevier, "Image is Everything: Strategies for Measuring, Changing and Maintaining your Institution's Image," *College and University* (Winter 1994).

Section 5b: Strategic marketing for Wisconsin County UW-Extension Offices

Report on the pilot counties

Three county UW-Extension offices participated in a pilot county marketing project in 1999-2000. Those three counties, Portage, Rock and Marinette, spent several months working with mentors from the External Relations Committee and a state specialist in public information, communications and marketing to develop and implement marketing strategies targeting local government officials and community decision-makers.

The pilot counties used many of the tools, concepts and processes described in this marketing training module. Their marketing plans reflect the process shown in the "Strategic Marketing" PowerPoint presentation.

What follows are descriptions of the plans developed and the pilot counties' assessments of their experiences, successes, frustrations, impacts and lessons learned.

Strategic marketing plan

Portage County

The Portage County UW-Extension office staff met on July 12, 1999, with Mary Ellen Bell, Public Information Specialist; Karen Joos, Monroe County Family

Living Agent; and Pat Walsh , Community, Natural Resource and Economic Development program leader, to begin development and implementation of a strategic, integrated marketing plan.

During the first in-person session, Portage County staff members discussed marketing, publicity and accountability programs currently underway. They talked about various ways to market individual programs such as the 4-H national advertising campaign and a broad set of marketing initiatives undertaken in the previous year. During this discussion some marketing challenges also came up. Staff members feel they need to do more to increase county board support and “improve our reputation.” Staff members believe that they need to develop more positive relationships with county government officials.

Goals

In discussing their own goals for marketing, the staff decided they wanted their marketing efforts to

- Increase awareness
- Show our value
- Show impact of programs
- Increase support

This led to development of the following goal statement for a marketing plan: “To increase support from county board and other key community leaders by raising awareness of the value and impact of our educational programs and resources.”

Decision-maker audiences

The group listed some of the most important audiences for programs and for marketing efforts. They determined that key local decision-makers, state legislators, and county and municipal government officials were their key audiences, with county government being most critical of all.

Audiences:

Key local decision-makers

- State legislators

- County government

- Municipal government

Others

- People in county departments

- Department heads

- County clerk (value)

- Finance & purchasing (story-tellers)

- Planning & zoning (roadblocks)

Data processing (support)
Health and human services
Emergency management
Police
Park department
Land conservation
Recycling
Aging
Library
Judges, district attorney

General public

Taxpayers and voters

The staff discussed some perceptions they hold about their position with their target audience. There is some uneasiness about relationships with county government and agreement that it's important to "communicate well with the people who pay you." One staff member said: "We have to improve our reputation and our relationship with the board. They don't support us."

Research

The Portage team hopes to tie market research to program planning by asking some questions related to the marketing effort (“How do you want us to let you know about what we do?”) and listening for clues during program planning meetings. They will let decision-makers know that they intend to continue their marketing efforts. They also intend to assess what they already know about the target audience.

They will measure their marketing outcomes toward this objective:

“We’ll know we are succeeding if/when ...

“We get support from county board members for maintaining or expanding staff and programs in all program areas. No more cuts.”

Activities

The group developed a list of potential projects, activities and strategies for reaching its marketing objectives. The activities given highest priority or deemed most likely to have a strong impact are indicated with a star. Activities that are already underway or can be started in the near future are:

- *Conduct face-to-face sessions with target audience (share information)
- *Finish PowerPoint presentation on county programs
- *Continue to develop interpersonal relationships
- *Do marketing research during listening sessions (September)
- *Initiate special outreach to personnel director, finance director

- Continue to do Extension “infomercials” at service clubs, etc.
- Contribute to each other’s newsletters
- Continue to invite county board members to events
- Develop issue forum for program planning
- Look for opportunities to market Y2K educational program
- Develop mail list of key community leaders

Activities to be implemented at a later date are:

- *Conduct special events for county board (tours of programs on site to show value)
- Suggest sharing information through presentations from each department at each department head meeting
- Develop issue/trends papers
- Develop issue seminars and other educational events for county decision-makers.
- Get to know new department heads

Summary and next steps

As staff members continue to work on this plan, they will need to complete several steps:

1. Decide how to assess effectiveness of marketing efforts
2. Write and use message points

3. Develop a timetable or calendar for marketing will help staff keep track of planned activities.
4. Select a key “activity manager” should be assigned to the various marketing activities

Outcomes:

Portage County staff had already begun a local marketing program at the time of the pilot, in effort to improve the visibility of their work among other county agencies and officials. The staff developed a PowerPoint presentation, new promotional pieces and displays. They also worked on enhancing interpersonal relationships with others in the courthouse, including hosting an open house to show off their new office space and promote their programs.

Strategic marketing plan

Marinette County

The Marinette County staff was already working on some marketing, publicity and accountability programs at the beginning of the pilot. These included a variety of promotions for the 4-H and master gardeners’ programs; strong ties

with the fair organization; targeted work with audiences for nutrition programs; and good relationships with other local agencies such as job service, food stamps, schools, human services, head start, public health, and non-profit and commodity groups. The staff used the community web site to promote programs and created an effective hallway display promoting Extension programs. The working relationship with local government was positive, especially on issues such as land use, census and business issues.

Staff members realized, however, that these individual efforts focus primarily on individual programs. They saw a need for more marketing of the total program offered through the county office.

Goals/objectives

The staff discussed a number of goals, objectives and activities for a county marketing plan.

1. Increased awareness of the diversity of programs offered through the county office
2. Increased appreciation of Extension's "quiet contributions " Sometimes we get confused with UW-Marinette

Do better public relations for what each program is doing; those not involved in the program may not ever know we're part of it; currently, there's no full staff meeting -- how to update each other?

3. Increase distribution of the brochure, which shows all programs
 - Create insert to brochure; list accomplishments/impacts that Extension is involved with
 - Clarify identity and competition; changes in logo and “images”
 - We’re in the background when things are underway -- then we don’t get credit for what happens; “sharing away all the credit”
 - We do try to make sure county committee understands our contribution
4. Year 2000: Make Extension’s role more credible/objective
5. Make sure the entire staff knows the clientele we work with
 - What group works with which agent?
 - Types of activities
 - People in 4H (volunteers, participants) don’t know the extent of Extension program breadth
 - Confront issue of not knowing all that Extension does
 - Talk about the whole office program; the ag office, the fair office, etc. Make a point of talking about all the program areas (at service club talks, for example.)
 - Help people (general public and staff) make connections among programs and to Extension
 - Develop a weekly calendar
 - Newspaper feature -- showing all four program areas

- Talk shows -- free visibility, public relations
- Cable TV -- events listings; easy and free
- Radio community calendar -- special events
- County fair (Extension office booth)

Message

“UW-Extension Marinette County is the University of Wisconsin in your community.”

Decision-maker audiences

Highest priority was assigned to three audience groups: School boards, State legislators and municipal officials. It was agreed that relationships with county government are already strong. Efforts should continue on working effectively with county government, but the other audiences should also get more attention.

School boards: The need with this group was to work with school boards as they face new standardized testing requirements for high school graduates. Extension staff will help by finding and disseminating research information about standardized testing and put it into usable form. The primary audience segments will be school boards, parents, and interested community groups. Information will be developed and shared at informational meetings and through the media.

These activities will support the goal of positioning UW-Extension as a source of research-based information.

State legislators: Extension staff will work to make sure that legislators know more about the county Extension office and its programs and to communicate more often and more effectively about what each person and program does. To meet this objective, staff plan to:

- Send legislators and their staff members copies of reports, newsletters, calendars of events and meetings; invite them to meetings and events.
- Organize town hall meetings where legislators can meet with constituents.
 - Develop a contact list for legislators, staff, schedulers
 - Invite them to shadow agents for a day
 - Share success stories

These activities will work toward a goal of expanding awareness of the variety and scope of Extension programs.

Municipal officials: The need with this audience is to find new ways to work with municipalities. To work toward this end, staff will make community leaders more aware of what other staff in the Extension office can offer in communities.

Municipal leaders working with one agent on business development may not realize that the local nutrition program is also part of the Extension office. Staff will make a point of mentioning what others in Extension may be doing in the same community. To accomplish this, Extension staff will share this information

among themselves as well. This plan works toward a goal of increased awareness of the variety and scope of Extension programs.

Summary and next steps

The Marinette County staff members determined they need to make individuals and groups more aware of what type of work staff members in their office do. To accomplish this, they will:

- Mention what others in Extension may be doing in the same community
- Share information internally so it can be shared externally
- Give clients ideas about who else they could work with

To begin they agreed to:

- Increase cross-program promotion with target audiences, especially officials
- Take the time to do it
- Get together as an entire staff to talk about this session and continue working on ideas developed
- Establish structure and format
- Compile a research component
- Hold monthly sessions on marketing
- Create newspaper inserts
- Create an official newsletter
- Use marketing brochure
- Identify and communicate with decision-makers
- Make better use of cable access

Outcomes

Marinette County staff reported that their experience with the pilot project was extremely productive and successful. They were especially enthusiastic about the new synergy that came from more regular staff meetings and cross program updates.

Lessons learned:

1. The staff started holding monthly all-staff meetings, and this increased level of communications among the four program areas. Even though they always had held meetings when needed, having a more formal format increased everyone's awareness of events, other meetings where people would be crossing program area clientele groups, and getting input on ideas. The discussion helped all program areas get feedback and new ideas. They also felt that Marinette County residents were better served by UWEX staff because of their increased level of knowledge about each other's programming and the new ideas we garnered from these meetings.

2. The staff spent a fair amount of time planning for potential events working with school boards, PTA's, etc. on the issue of statewide testing mandates. This turned out to be unnecessary – it became a non-issue.

3. Most of the staff were somewhat surprised at the fairly high level of interest of clientele in hearing about the other programmatic areas within UWEX when we discussed that at meetings.

4. Next year they will focus more on one audience, such as the county board or the legislators. They will do more work with the county board, the one group that we did not work with well enough, especially in light of the fact that this was an election year and there are 7 new board members.

5. The largest benefit was probably increased communication amongst the staff and better idea sharing and generating. The staff believes there have been benefits to individual program areas, as well, but those are harder to quantify or qualify.

6. From a staff report: “It pays to have everyone participating in our processes; especially when looking at office-wide issues, we need to have everyone on staff, not just agents, involved. Also, even though an individual may be at a given program for a specific reason, he is likely interested in having other potentially helpful information given out, as well.”

Strategic marketing plan

Rock County

IntroductionThe Rock County UW-Extension office worked with facilitator Mary Ellen Bell, Public Information Specialist; and mentor José Vásquez, SE District Director, to begin development and implementation of a strategic, integrated marketing plan.

During the first in-person session, Rock County staff discussed marketing, publicity and accountability programs currently underway. They talked about a variety of activities to market individual programs and work with key decision makers (marketing efforts with the Spanish-speaking community and 4-H programs), but staff generally agreed that many people are familiar with only some aspects of the program (such as ag programs, nutrition programs) and do not have a broader view of Extension. They also discussed the limited financial resources available for marketing efforts. One agent talked about feeling like an “independent practitioner” and his desire to be more connected with the work and resources of others in the office. Others discussed a concern about marketing when viewed as an add-on -- more work in an already busy schedule, and a hope that any marketing program developed will result in tangible actions and results. Another expressed the view that doing good programming is the best marketing.

Goals/objectives

In discussing their own goals for marketing, the staff decided they wanted their marketing efforts to:

- Establish a niche and differentiate them from other community educational organizations
- Assure continued funding
- Increase visibility and understanding of the total program of the office
- Validate programs
- Boost credibility with stakeholders

To do this, they want to find more opportunities to invite county officials to participate in a program or visit program sites, to stress cross-promotion of their office colleagues and their programs, and to improve their visibility in the courthouse through more effective signage.

Message

“We deliver educational programs that lead to public betterment.”

Decision-maker audiences

The staff believes the highest priority audiences are members of the county board and the county administrator and his staff. They plan to target these audiences to help them get to know “who we are and what we can do for them.”

Activities

In the coming weeks and months, the staff intends to undertake several activities to improve their marketing to the target audiences:

- Develop one-sentence descriptions of what we all do
- Invite board members to programs, target constituencies
- Improve court house signage
- Create an extension staff directory
- Meet with administrator’s key staff
- Take them to lunch
- Hold an open house

Research

The group discussed several methods for conducting preliminary market research to confirm perceptions about the market audience and establish a baseline for assessing the impact of marketing efforts. They will continue to discuss:

- Assessing demographics (profile) and attitudes of the audience
- Environmental scanning (should include non-clients)

- Marketplace competition

Summary and next steps

As the staff continues to work on this plan, it will need to complete consideration of how the office staff will determine the effectiveness of marketing efforts (research and assessment). A timetable or calendar for marketing will help staff keep track of planned activities. A key “activity manager” should be assigned to the various planned marketing activities.

Outcomes

Rock County, the most urban and complex of the three pilot counties, faced more challenges in implementing its plans than the other pilot sites. They did report these results:

1. The Rock County staff produced a purpose statement: “To invite county officials to participate in, observe, or learn about agent programs; to stress cross promotion of staff programs; and, to have visibility in the courthouse through effective signage.”
2. Agents shared plans of work to find possible linkages for joint efforts.
3. Agents developed and shared a very brief written description of what they do.

4. Agents performed a diagnosis/profile of individual county board members to better understand interests and perceptions.

5. UWEX applied research findings were presented to the county board as an input to policy formation.

6. Spring 200 activities include installation of courthouse signage and a staff directory, open house invitation to the county board to show our renovated office, and a briefing session with top administrative staff.

Lessons learned (from a survey of the staff)

- "Too early to tell -- some goals and target dates are in the future."
- "Difficult to create and implement a pilot without funding."
- "Working together as a team wasn't possible because of weak commitments. Consensus not possible. Does marketing have to be done by entire staff? I don't know."
- "Good opportunity to visit with county administrators--share UWEX programs and listen to their ideas/needs."
- "Some staff don't view marketing as a central issue affecting their work. And a few staff members resist group planning discussions. These are hindering factors that make a marketing plan for the office infeasible."

Conclusion

“Agents have different values and these should be honored. Individual readiness to work with motivated colleagues needs to be explored in order to discover mutual self-interest and common goals. Go with those who are able to commit to each other. These staff are most likely to succeed with accomplishments and results; they take the lead. Others deserve to be kept informed and encouraged to participate when they are really interested.” (from a staff report)

Appendices

Section 5a: Glossary

Advertising

A tool used in sales and public relations to raise consumer awareness and create a demand or desire for a product.

Decision-maker

A person or persons, who have influence on the future direction of funding for Cooperative Extension programming including local, state and federal public officials, clientele and collaborators. A decision-maker may be any elected or appointed government official, business or faith leader, client, collaborator, educator or citizen.

Impact reports

Short reports that share the outcomes of Extension education programming.

Marketing plan

A formalized system or process of planned actions designed to increase visibility, awareness, funding support, expansion of client base or other Cooperative Extension goals through communications. A marketing plan is very similar to a communications plan. The major difference being marketing plans put strong

emphasis on measuring the results of communications activities, either by measuring sales (the business model) or changes in attitude and behavior (informational marketing model).

Marketing research

Any process of gathering information about audiences, competitors, products and consumer preferences. Tools of market research include surveys, focus groups, informational interviewing, content analysis and other research techniques.

Niche

A unique position within the market that gives an organization or business an advantage in the marketplace. A niche may be an unusual product, a reputation for quality or responsiveness, a unique customer base or other quality. Effective marketing plans identify and capitalize on the business's or organization's niche.

Outcomes

The results of Extension education programming

Promotion

The publicizing or advertising of Cooperative Extension and its programs, events and materials with the goal of increasing visibility, attendance or sales, or meeting other marketing goals.

Public relations

Using a marketing approach to increase goodwill, visibility and name recognition and to enhance public perceptions.

Segmenting

Breaking down audience groups into small, mostly homogeneous grouping for marketing purposes. For example, the audience “Extension clients” includes segments that can be identified by age, income, race, occupation, interest, neighborhood, education or any other category.

Strategic marketing

A focused plan to meet a specific organizational goal through marketing.

Success stories

Case studies describing how Cooperative Extension programming has made a difference in people’s lives or met economic, environmental, social or educational goals.

Target audience/market

A group or class of people whose support, goodwill, participation or partnership is important to the success of a program or to achievement of an organizational goal. The target audience’s communication style preferences, interests and needs are the foundation for an effective marketing plan.

For further information or support

Section 4a: Mentoring network

Members of the External Relations Committee and faculty and staff in the three pilot counties may serve as mentors or consultants to help you develop your own strategic marketing program.

NOTE: THIS website has been neglected. Resources once available there are no longer there. It appears to have been untouched since the last minutes were posted in April 2000. DELETE THE REFERENCE HERE. NOTE: Again, the list of members of the committee is out of date. Delete the reference here.

3. Office chairs/marketing contacts in Portage, Marinette and Rock counties

Section 4b: The Program Development and Evaluation website has a number of helpful resources to help you evaluate and communicate the value of your work.

[\(http://www.uwex.edu/ces/pdande/\)](http://www.uwex.edu/ces/pdande/)

Section 4c: Communicating Impact

The Cooperative Extension planning and results system (LINK to P&R site)) provide an excellent source of information to share with decision-makers.

Because the reporting can be tied directly to defined communities or regions, targeted briefing papers and other impact reports can be prepared to show local

value to public and private funding agencies and others. Good planning and evaluation lead to reportable results tied directly to Extension programs.

Section 4 d: Success stories

(HYPERLINKS: Success stories; Urban Initiative website; External Relations Website)

Section 4e: Further reading recommendations

The following materials were provided to all county offices in 1995 by the Effective Professional Relationships Team.

Formatted

NOTE: You may need to go through this reference list again to double check the bibliography style. I don't care which we use, but it should be consistent.

Cooperative Extension-University of Wisconsin-Extension, Effective Professional Relationships, January 1995.

Antonioni, David. University of Wisconsin-Madison, School of Business-
Management Institute. Building Team Work Relationships. October 13, 1994.

Barrows, Richard. Public Policy Education. University of Wisconsin, Extension
Publications, Madison, WI. October 1993.

Boldt, William, G. Strategic Marketing for University of Wisconsin Cooperative
Extension System. March 1993.

Fitzsimmons, Ellen. Building Local Support. Presentations Outline and
Assessment Exercise .October 1992.

Graf, Kermit W. The Executive Director's Guide to Marketing the Not-For-Profit
Agency. 1993.

Hinds, David G. Understanding County Budget and Fiscal Issues, Background
and Information for Wisconsin Cooperative Extension Faculty. February 1994.

Lewis, Andy. First Impressions of the UWEX Office, An Assessment Tool to
Evaluate Customer Impression and Office Image.

McCoy, Palmer. Common Sense Approaches to Operating and Programming in
the Cooperative Extension Service.

Michigan State University Extension. Communicating with Decision Makers.

Michigan State University Extension, April 1993.

North Carolina Cooperative Extension Service. North Carolina State University & North Carolina A&T State University. Communicating Excellence, The Extension Service Marketing Manual.

National Public Policy Education Committee, Cooperative Extension. Public Issues Education Materials Task Force-1994. Public Issues Education: Increasing Competence in Resolving Public Issues # G3629. Cooperative Extension Publications, Madison, WI.

Rossing, Boyd. Expanding Partnerships and Building Collaborative Leadership: Introductory Concept Papers. University of Wisconsin-Cooperative Extension. Second Edition, November 1990.

University of Minnesota., By Project Public Life. The Book: the Political Educator's Guide to Citizen Politics-Draft.

UWEX Communications Team, University of Wisconsin-Extension. UW-Extension Media Communications Policy & Protocol. 1995.

Wisconsin Manufacturers & Commerce. 1995-1996 Legislative Directory.

Other good reading:

Covey, Stephen, R., Merrill, Roger A. & Merrill, Rebecca R. First Things First.
Simon & Schuster, 1994,

Donaldson, Les. Conversational Magic, Key to Poise, Popularity and Success.
Reward Books, Paramus, NJ. 1981.

Payne, Ruby K. Ph.D. Devol, Philip, & Dreussi Smith, Terie. Bridges Out of
Poverty: Strategies for Professionals and Communities. Aha! Process, Inc. 2001

Maggio, Rosalie. How to Say It, Choice Words, Phrases, Sentences &
Paragraphs for Every Situation. Prentice Hall, Paramus, New Jersey. 1990.

Marketing is everyone's responsibility

Section 3a: Team approach to marketing

The best method is to approach marketing as a team effort, using the office team or unit approach. Our personal and unit effectiveness depends on our ability to build and foster a supportive team environment for communicating the value of UW-Extension and its programs.

In a county office, teamwork is crucial to a positive office image. The team leader plays a key role in building a supportive team environment for marketing. The office team includes all office members -- faculty, academic staff and support staff. In leading the office team, the team leader:

- 1 Provides access to information the team needs
- 2 Inspires the team to develop a shared vision
- 3 Increases the team members' empowerment
- 4 "Walks the talk" all the way
- 5 Recognizes the need to celebrate small wins

Some additional roles for the team leader include:

1. Encourages participation by all members
2. Helps other members of the team when the need arises

3. Takes time to become familiar with each colleague's program -- and looks for ways to be supportive
4. Mediates when conflict arises

Section 3b: Marketing is everyone's responsibility

Everyone in a county Extension office or unit has a role to play in a strategic marketing effort.

Department head responsibilities:

1. Take leadership role in getting marketing process started by scheduling a meeting with marketing as the agenda. Use and make available to entire office staff the external relations and marketing resources identified in resources list.
2. Inform staff about the purpose and importance of meeting.
3. Use team-building strategies to include all members of the office staff in marketing efforts.
4. Facilitate initial meeting or delegate to another Extension colleague (office or another county) or a community member with knowledge and facilitation skills.

5. Take a leadership for or delegate to another colleague primary oversight of office marketing efforts as determined by total office team.

6. Continue to motivate marketing process with appropriate monitoring and evaluation methods.

Faculty/academic staff responsibilities:

1. Take leadership for your program area marketing and work on total county office marketing efforts.

2. Brain storm ideas for marketing your county office or unit, your program and cross program opportunities.

3. "Marketing is Everyone's Responsibility." Find your "niche" and make it part of your daily, weekly and special opportunity efforts through use of program impacts.

4. Invite your client groups to market your programs through combined efforts to show the difference your program makes in their lives and those of the community at large.

5. Prepare success stories with photos and client comments to share with decision-makers and media.

6. Share programs with office staff to help marketing efforts for entire office.

Office support staff responsibilities

1. Provide input and be involved as “front line” marketers for the office and programs.

2. Maintain an appropriate office image through daily efforts: telephone protocol, walk-in clientele, messages and general office appearance.

3. Stay informed of all programs within the office to answer basic questions for the public and clientele groups.

4. Accept responsibility for total office marketing efforts.

The Marketing Plan

Section 2a: What is a marketing plan?

A marketing plan is similar to a communications plan, but it usually places more emphasis on measuring results of marketing activities. The plan is a set of steps for achieving a marketing goal. It's not a rigid recipe, but the steps usually include setting a goal, defining the project or activity, carrying it out and deciding if it worked as you intended.

Below is a commonly followed marketing model. We have added examples for each step in *italics*:

Strategic Marketing Plan

Cheesehead County, Wisconsin, UW-Extension Office

Step One: Write a Goal Statement.

The goal statement should have a clear relationship to your organizational mission. It should clearly and concisely define the problem, opportunity or need.

Try to limit the goal statement to 25 words. The goal statement might relate to the

image you want the public to have of the organization. Or it might be directed at a specific program or activity. The goal statement may state an expected outcome. It does not state specific measures of the outcome, identify audiences or define specific activities. That comes later.

Develop a public perception of the value of the UW-Extension office as “blank” County’s best resource for research based information.

Step Two: Identify and Segment the Market.

Naming and defining your audiences is more than just making a list. You need to consider the characteristics, needs, desires and motivations of each audience. To do that you'll have to analyze and break up the audience into smaller groups with common characteristics. This is called market segmentation and includes:

- Splitting the group into smaller segments with common characteristics
- Putting these segmented markets in priority order
- Listing the people who influence each segment of the market

- Use demographic information to make sure you have identified leaders and decision-makers who represent the diversity of the racial, ethnic, economic, religious, age, gender, ability and other groups in your community.

Examining the audience this way helps you decide which activities or strategies will be most effective with each of your audiences and which market segment should get most of your attention.

Highest priority was assigned to three audience groups: school boards, state legislators and municipal officials. It was agreed that relationships with county government are already strong. Efforts should continue to work effectively with county government but the other audiences should get more attention.

Step Three: Conduct Research

Market research is important for several reasons:

- To accurately define and segment the audience, you have to know who they are.

- If you don't understand the social environment, your message could get lost or be seen as irrelevant.
- If you don't have some baseline information about your market position, you can't show that your marketing activities had any effect.

Market research can range from informal assessments or scans to formal market research techniques such as survey research. You need to decide the most cost effective way to conduct the research, depending on your marketing goal.

However, you should consider gathering information about the following:

- The target market. What are its demographic and geographic characteristics? Consider age, sex, race, education, marital status, income or any other factor that might be appropriate.
- The environment. What social, demographic, economic, governmental or technological trends affect the target audience? How does the price of your product or service affect acceptance? In the case of Extension programs, consider non-monetary "costs" such as time and accessibility as well as economic price.

- The competition. Who else provides a similar product or service? Who else is courting your target market? What are their strengths and weaknesses? What are yours? How can you use this understanding to create a unique position or niche in the market? (If you can't find your competitive edge here, this is where you reassess -- find a new audience, change your product or change your goal.)

We decided to clarify our image by conducting informational interviews with the county board chair, the mayor of Hooville, the school district superintendent, chair of the township association, our state senator and state representative. As a result of the interviews we learned:

- *Many members of our target audience believe that Extension is still a largely rural, farm-based organization.*
- *People do not understand the connection between 4-H, agriculture, family living and CNRED programs as part of a unified UW-Extension office.*
- *People sometimes confuse us with the local two-year UW campus or the local Voc Tech school.*

Step Four: Identify Specific Objectives

Write a series of specific statements that explain what you want to accomplish with your target audience. For example, you could decide you expect a certain percentage of people to identify Blank County Extension as the place to go for information based on university research about a certain topic.

A good way to write an objective statement is to start with the words "This program is a success if" Your objectives should be realistic and achievable.

Our objective is to increase the percentage of people who recognize Extension as their best source for research-based information. Specifically, we will achieve the following:

- *A 20 percent increase in calls to the Extension office for educational information.*

- *Existing and new Extension clients, partners and local decision-makers will become aware of the variety of educational programs at the county office and of the county office link with the University of Wisconsin-System.*
- *Three new agencies or organizations will form partnerships with the Extension office.*
- *State legislators will consider using or will use Extension as a source of researched-based information.*
- *The school district will include Extension in its 21st Century Grant for after-school programs.*

Step Five: Develop A Market Position

Positioning means setting yourself apart from the competition. It's showing how your organization, product or service is unique. It's naming your advantages and describing how you want your target audience to see you.

Positioning is based on what you learned about your audience. If you want to project a certain image to that audience be sure that image is accurate and valid. If you are unable to deliver what your image promises, your marketing program will have a negative impact.

Usually you position the organization differently to different audiences.

Cheesehead County adopted this message and intends to use it in newsletters, news releases, correspondence and personal presentations whenever possible.

“We are the University of Wisconsin in our community.”

Step Six: Prepare Your Plan

This is where you get creative. It's time to act on the previous steps and develop messages, pick a mix of media for delivering the messages, and write an overall game plan. Here are some of the things that are involved in creating a marketing plan:

- Pick your message points. Think about messages that stress benefits to your target audience. Limit yourself to three or four main message points. Remember that message points should be meaningful to all kinds of audiences and reflect the diversity in your community.
- List the media mix. Think about what mass media and informal information networks your target audience uses.
- Create a rough timeline.
- Create individual plans for individual marketing activities. These plans are very specific and define exactly what activity is to be accomplished, when it is to be done and who will do it.

As they developed their action plans, the people in Cheeshead County decided to work on the following activities. For each activity, they wrote a brief action plan. The action plan included a precise description of the activity, a due date and the name of the person responsible for the activity.

- *Send legislators and staff copies of reports, newsletters, calendars of events and meetings*
- *Invite them to meetings and events*
- *Organize town hall meetings where legislators can meet with constituents*

- *Develop contact list for legislators, staff and schedulers*
- *Invite local officials to “shadow” agents for a day*
- *Share success stories with legislators, school board members, school administrators, and municipal officials.*
- *Make sure all office staff are aware of programming and activities of other members of the staff.*
- *Remind educational audiences about other programs available through the Extension office (cross program promotion)*
- *Increase distribution of office brochure that includes impacts and success stories.*
- *Connect with local media to increase coverage on radio shows, cable shows, and newspaper articles.*

Step Seven: Evaluate, assess and refine

Build a way to measure effectiveness into your plan. You may need to establish some intermediate checkpoints to make sure things are going according to plan.

The kind of evaluation you do depends on how much you want to put into it.

Formal evaluations and survey research can be time consuming and expensive.

Informal surveys or focus groups are easy and cheap, but they can be less reliable.

Here is Cheesehead County's assessment plan.

After three months, we will conduct informational interviews with target audiences. We will ask if information from the Extension office and contacts with agents have been helpful to them or if there is something they have learned about Extension in the last three months that they didn't know before.

We will conduct a self-assessment with the county team. What seems to be working well? What is not working well? We will plan for new activities and new audiences and opportunities.

We plan to repeat this assessment, with different members of the target audience about every three months.

Section 2b: Strategic Marketing Planning Worksheet

1. Write a goal statement. (This goal statement should have a clear relationship to the organization's mission and clearly describes the problem, opportunity or need.)

2. Identify and segment the primary target audiences. (Who are the most critical audiences? Who has influence over your program priorities, budget, staffing, etc.? What are these audience's differences and common characteristics and why are they important to the Extension Office?)

3. Research. (How will you figure out where you currently stand with your target audiences, the environment in which you work, your competition and your "niche"?)

4. Define objectives. (What, specifically, do you want to accomplish with your target audience? Can you quantify your desired result?)

5. Develop a market position (messages). (In one sentence, describe your place in your market place, your community, and what sets you apart from other organizations?)

6. What activities, events, or efforts will you undertake to deliver your messages to your target audience?

7. Assess and refine. (After three months, review your strategy and marketing plan. What is working and what is not working? How will you conduct this

assessment with external and internal audiences? Plan on regular assessments (about every three months) and a major revision of your plan after two years.)

2 c. Evaluating marketing plans

The following checklist will guide you as you develop your own evaluation tool for your marketing plan.

List the objectives of the marketing plan

Determine the criteria for reaching the objectives

List methods of collecting information that would address the criteria

List groups and/or individuals from whom information will be collected

Develop tools to collect the information based on the audiences and methods

Administer the tool

Summarize the results

What was learned – What was successful and what needs to be improved

Next steps in the marketing plan

Introduction to Marketing

Section 1a: Defining marketing

In business, having a good product is critical, but if no one knows what it is, what it does, who makes it or how to get it, the best product will fail in the marketplace.

Likewise, simply doing good Extension work does not assure that people will appreciate the value of the educational programming Cooperative Extension does in a community. Sharing information about the programs and their results helps stakeholders understand why the work is important and why it deserves to receive public support. This sharing process is often referred to as “marketing.”

People often talk about “marketing” as if it were the same thing as selling, promotion, advertising or public relations. The concept that sets marketing apart from these other activities is that marketing consciously takes into account and tries to fill the needs and desires of the intended audience—the customer or client—and attempts to measure and demonstrate how marketing activities have changed attitudes and behaviors.

Public relations professionals often use marketing techniques to “sell” an organization to its many audiences. They may attempt to create an image that appeals to key audiences and to position the organization as the place to go for goods or services audiences want.

Advertising and promotions people also use marketing concepts and often do a great deal of market research to determine the preferences and interests of intended audiences.

Section 1b: Marketing Cooperative Extension

Marketing is an effective way to tell our story to the people who support us and rely on our educational programs. As a public institution, we must demonstrate the value and relevance of our programs to the needs of citizens. Taxpayers and elected officials demand accountability for the use of tax dollars. They want to know that investments in public programs serve citizens and address critical issues in creative ways. When decision-makers see institutions as responsive to the needs of people, they are more likely to support the efforts of these institutions. If they see an institution as unresponsive or irrelevant, it's the institution's funding and future are in danger.

The University of Wisconsin-Extension historically has enjoyed generous public support, primarily because of the close ties between Extension programs and the people of the state. In Cooperative Extension, local people and partner organizations help us determine priorities and plan responsive, relevant programs. We allocate financial and human resources to address priority needs identified in the planning process. Program evaluation and assessment of program impacts focus on these priorities and on the changing needs of people. In this way, we make sure that Extension programs remain relevant.

However, planning and program development alone are not enough. Extension also must develop and execute plans that communicate to key decision makers the impact of programs on citizens. It is shortsighted to assume that if we provide high quality programs, we have assured viable and active support. Extension must demonstrate the importance of its programs. However, it is important to note that political involvement must be appropriate and consistent with our mission.

Achieving our educational goals depends as much on public knowledge about and support for our work as upon planning and executing a well designed program. Our ability to attract base funding, external resources, volunteers, partners and program participants, depends on promoting ourselves as worthy of receiving scarce dollar resources or time

In Extension, we have a great product - education. We deliver research-based, objective education to meet the needs of local audiences. We collaborate and partner with community-based organizations to provide relevant and cost-efficient programs.

Section 1c: Audiences

Usually the key marketing audiences for an organization are its own employees, volunteers, clients, potential clients, taxpayers, opinion leaders, decision-makers, funding sources and the news media. Marketing goals target these audiences –

creating visibility or awareness and developing understanding and support for the organization's mission and activities.

For Extension, key audiences include those who provide funding support for our programming: federal, state and local government as well as current and potential grantors. These partners determine Extension budgets. If we are to retain their support and goodwill, we must make sure they understand and value what Extension does. This is especially true now that government budgets are increasingly tight and competition for government and private resources are growing.

Marketing can also target new audiences for Extension programs. As Wisconsin grows and its diversity increases, working with new audiences makes Extension more effective and increases public support for Extension educational programming. A well-developed marketing strategy helps Extension grow and change as Wisconsin grows and changes, assuring that our statewide outreach education is relevant and responsive.

Section 1d: How marketing happens

Marketing can be passive or active. It can happen by chance. Or it can happen because of a conscious effort to take advantage of an opportunity.

Passive marketing includes many things that are part of the regular activities of the organization. Some of these things happen without any conscious intent.

Others are planned. Some things that are passive marketing might include:

- The quality of the product or program
- The impression people get when they telephone or visit the office
- How employees dress and speak
- How clients or customers are treated by employees
- The appearance and quality of communications materials

People in organizations do passive marketing intentionally when they look for ways to increase their visibility. They might post signs at program events, use a logo prominently and frequently, or do anything that keeps the organization's name and mission in the public eye.

Active marketing is a strategically planned program for carrying out defined marketing activities. When you decide to create a speakers' bureau, develop a new media campaign or hold an open house, you are doing active marketing.

Module Eight – Communicating Value

In this competitive world, those who tell their stories most effectively will be the most successful. This module is designed to help you tell the UW Cooperative Extension story.

We communicate our value best when the entire county office team or unit works together to share stories about program outcomes and successes. This module will provide tools, tips and resources to help you create and use a marketing plan for communicating the value of your programs and services.

Specifically, we hope to help you:

- Better understand the benefit of communicating the results of your programming efforts to important audiences;

- Become proactive in developing working relationships with decision-makers and funding sources that influence the future of UW Cooperative Extension;

- Develop strategic marketing plans that are integral to your programs and support the mission and goals of Cooperative Extension;

- Provide you with resources for conducting and evaluating marketing efforts; and

Develop outcome/impact statements and success stories to demonstrate to decision-makers the value of your programs.

This module of the Managerial-Leadership Curriculum will outline and clarify:

1. Introduction to marketing
 - a. Defining marketing
 - b. Marketing Cooperative Extension
 - c. Audiences
 - d. How marketing happens

2. The marketing plan
 - a. What is a marketing plan?
 - b. Marketing plan worksheet
 - c. Evaluating marketing plans
 - d. Strategic Marketing.ppt

3. Marketing is everyone's responsibility
 - a. Team approach
 - b. Team
 - Department heads
 - Faculty and academic staff
 - Office and support staff

4. Further information/support
 - a. Mentoring network
External Relations Committee members (LINK TO External Relations Committee Home Page)
Office chairs/marketing contacts in Rock, Portage and Marinette counties (LINK TO Mentors)
 - b. Evaluation and outcomes (<http://www.uwex.edu/ces/pdande/>)
 - c. Communicating impact.ppt
 - d. Success stories (HYPERLINKS: Success stories; Urban Initiative Website; External Relations Website)
 - e. Further reading recommendations

5. Appendices
 - a. Glossary
 - b. Pilot marketing programs
Portage county
Marinette county
Rock County
 - c. Marketing Marinette.ppt
 - d. Bibliography

6. Team
7. Module Eight evaluation

Section 6: Team Members

Sue Buck, Co-Chair

Jose Vasquez, Co-Chair

Mary Ellen Bell, Facilitator

Jeanne Baum

Lee Cunningham

Dave Giroux

Jennifer Grondin

Mark Hilliker

Marcia Jante

Karen Joos

Dave Kammel

Mary Novak

Rita Straub

Pat Walsh