

Mission, Mandates, Vision, Values, Goals

UW-Extension, Cooperative Extension

Mission, Mandates, Vision, Values, Goals

Organizations that have a clearly defined process for collectively articulating and communicating their organizational mission, mandates, vision, values, and goals are more successful in achieving their goals as an organization. Kouzes and Posner in their book *The Leadership Challenge* identify numerous organizations and businesses that have prospered because everyone in the organizations felt invested in the process and thus had a sense of ownership of the organization's mission, mandates, vision, values, and goals. Many other authors such as Bryson, Senge, Block, Drucker, Kanter, and Covey have chronicled the success of organizations that have taken the time to achieve a common sense of purpose and direction.

UW-Extension, Cooperative Extension is also committed to establishing a common sense of purpose and direction that will empower and help guide the work of everyone in the organization. How we succeed as an organization is very dependent on the leadership that is provided for administrative and department units throughout Cooperative Extension. This learning module is number one of eight modules that are provided for administrative and department unit heads to help them in carrying out their leadership roles and functions.

The book by Kouzes and Posner, *The Leadership Challenge*, provides a conceptual framework for all eight learning modules. Other resources and authors are also incorporated in the curriculum. Throughout this learning module the reader is frequently directed to sections of *The Leadership Challenge* for a more in-depth treatment of specific topics.

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This module will help you:

1. Clarify critical definitions and their roles in effective organizational and personal leadership:
 - [Mission](#)
 - [Mandates](#)
 - [Vision](#)
 - [Core Organizational Values](#)
 - [Core Leadership Values](#)
 - [Goals - Organizational, Team, and Individual](#)
2. Clarify Cooperative Extension's:
 - [Historical Context](#)
 - [Mission](#)
 - [Mandates](#)
 - [Vision](#)
 - [Core Organizational Values](#)
 - [Core Leadership Values](#)
 - [Goals - Organizational, Team, and Individual](#)
3. [Work with your department / unit colleagues](#) to prepare a mission statement, vision statement, objectives and goals for your department/unit. Identify any additional mandates that your unit is required to follow
4. [Role model](#) the core organizational and leadership values that Cooperative Extension faculty and staff want their leaders to demonstrate.

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Clarify critical definitions and their roles in effective organizational and personal leadership:

Mission:

According to John Bryson in *Strategic Planning for Public and Nonprofit Organizations*, mission "clarifies an organization's purpose, or why it should be doing what it does."

Mandates:

Mandates define what an organization is formally and informally required to do or not do by external authorities. Formal requirements are likely to be codified in laws, ordinances, articles of incorporation, other legal documents, and the policies and procedures of organizations. Informal mandates may be embodied in the cultural norms or expectations of key stakeholders. (Bryson, 1995)

Vision:

Bryson also notes, vision "clarifies what the organization should look like and how it should behave as it fulfills its mission." Kouzes and Posner define vision as "an ideal and unique image of the future." For a more detailed description of vision please review pages 90-148 of *The Leadership Challenge*.

Core Organizational Values:

Core organizational values are those values that refer to here-and-now beliefs about how things should be accomplished. Values help us determine what to do and what not to do. Members of an organization should be able to enumerate the organizational values and have a common interpretation of how the values will be put into practice. For people to understand the values and come to agree with them, they must participate in the process. For a more detailed description of core organizational values please review pages 209-241 of *The Leadership Challenge*.

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Core Leadership Values / Characteristics:

Core leadership values are those characteristics that members of an organization value in their leaders. Leaders with those characteristics will have greater credibility as a leader. See *The Leadership Challenge* pages 19-31 for a description of the characteristics valued by members of most organizations. In the section that follows the characteristics valued by Cooperative Extension colleagues are identified.

Goals - Organizational, Team, and Individual

Many different groups and organizations and authors define the terms “goals” and “objectives” differently.

The Cooperative Extension Strategic Planning / Professional Development Group⁽¹⁾ indicates that objectives and goals operationalize values for specific situations. They have defined the terms in the following manner:

Objectives - The object of a course of action or something to be worked for or striven toward.

Goals - The performance levels or amounts of an objective to be attained within a specific time and cost limits.

Congruence of Values, Goals and Objectives:

Values, objectives and goals are an important part of the strategic planning process at the institutional, team, and individual basis. Individual, team, and institutional objectives and goals need to be congruent. If they are not compatible, it will be difficult for any organization to effectively achieve its mission. The process of articulating values, goals and objectives can be very helpful in creating organizational consensus and organizational synergism where the whole is greater than the sum of the parts.

If individual, team, and organizational values, objectives and goals are not compatible, an effective leader / manager should work with their colleagues to determine the basis for the incompatibility.

Kouzes and Posner on pages 155-159 of *The Leadership Challenge* examine the importance of shared values and goals.

(1) Strategic Planning Professional Development Group
David Hinds (Chair), Steve Grabow, Mary Guenewald, Carl Duley,
Bill Rizzo, Mark Hilliker, Connie Abert, and Terry Gibson

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- Clarify Cooperative Extension's:**
- Historical Context
 - Mission
 - Mandates
 - Vision
 - Core Organizational Values
 - Core Leadership Values
 - Goals - Organizational, Team, and Individual

Historical Context:



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Historical Context:

"Cooperative Extension's history is the history, of men, women, and families. It is woven into the fabric of American history -- and the pivotal events -- that shape our world. Extension helped jumpstart the engine of American agriculture, firing up the most efficient production system in the world. Extension shaped rural society with powerful coalitions, cooperatives, and associations. Extension played crucial roles in World War I, the Depression, and World War II, helped create



farm policies, economic structures, and institutions that exist to this day. As rural and urban families changed and farm numbers fell, Extension evolved with programs tailored to fit the diverse needs of American families of all backgrounds, races, ages, abilities, and income levels. In short, Cooperative Extension's

history is the history of an organization and its people intimately involved in Wisconsin's history and everyday public affairs."

The preceding statement from the Peddling Progress: Extension's Role in Public Affairs authored by Marla Maeder acknowledges Cooperative Extension's historic mission and the evolution of that mission as the conditions have changed in the intervening years. The complete presentation is available upon request.

Federal and state legislation and administrative rules have also shaped the mission of Cooperative Extension. The Morrill Act of 1862, the Hatch Act of 1887, and Smith-Lever Act of 1914 have been amended many times in the years since their creation. Wisconsin State Statutes have also been created and amended. Changes at the federal, state, and county levels will continue shape the mission of Cooperative Extension

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Mission:

Mission:

The University of Wisconsin System Board of Regents approved the following mission statement on June 10, 1988:

In addition to the UW System mission, the mission of the University of Wisconsin-Extension is to provide, jointly with the UW institutions and the Wisconsin counties, an extension program designed to apply University research, knowledge, and resources to meet the educational needs of Wisconsin people, wherever they live and work.

This mission includes the programs of the three UWEX divisions, Cooperative Extension, General Extension, and Telecommunications, in:

Teaching: To extend noncredit continuing education opportunities and campus-based degree credit, including programs to meet the relicensure and recertification needs of professionals, through a variety of delivery methods and media. These programs develop, organize, and impart knowledge and research applications needed by the general public and by such special groups as business, labor, agriculture, youth, families, government, and the professions.

Applied Research: To identify research problems, conduct applied research, and demonstrate the results of research relevant to the specific needs of individuals, organizations, businesses and communities.

Public Broadcasting and Communications: To provide informational, educational, cultural, and public affairs programming via public radio and television, and to improve and encourage effective use of existing and emerging communications technologies for public information, extension education, and communication among faculty, staff and clientele.

Statewide Program Leadership, Coordination, and Accountability: To provide for access of all Wisconsin citizens to the research, knowledge, and resources of their University System through program leadership, budget administration and program/budget accountability for a coordinated statewide extension program delivered with and through the University of Wisconsin System institutions and county and area Extension offices.

UW-Extension also serves as the UW System and state land-grant representative for extension program relationships with state government, appropriate state and federal agencies, and private sector groups, and it joins with county and other local units of government in the administration of the Cooperative Extension program.

The more specific character and purposes of the University of Wisconsin-Extension are delineated by examples of its particular program goals and clientele. These include, but are not limited to, the following:

- a. To educate and help agricultural producers, related businesses, and consumers apply the knowledge gained from basic and applied research.

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- b. To strengthen the economy of Wisconsin and the economic interests of working people through educational and counseling programs for business owners/managers and employees, entrepreneurs, labor and trade union leaders, local governments, and community groups.
- c. To improve the cost-effectiveness and quality of government services and community planning through educational programs and counseling assistance to government officials and leaders of both urban and rural communities.
- d. To provide continuing education for professionals, organized groups, and the public on new developments in technical and scientific research and its applications.
- e. To meet the educational needs of families and community leaders as they seek to improve the quality of life in the home and community and help youth realize their full potential and become responsible citizens.
- f. To provide a wide range of educational opportunities for individuals to develop leadership skills and improve their effectiveness in volunteer roles.
- g. To provide educational and public policy contributions to assure environmental quality and adequate conservation and efficient use of our natural resources.
- h. To enhance individual and group understanding of public policy issues and the implications of social, political, economic, and technological change.
- i. To contribute to the quality of elementary and secondary education through counseling, application of research findings, and educational programs for families, communities, and school professionals.
- j. To improve human health and nutrition and the availability and quality of health care and social services through educational assistance to professionals, paraprofessionals, institutions, families, and communities.
- k. To meet individual and community needs for intellectual development, cultural enrichment, and creative learning in the arts, sciences, and humanities.
- l. To create a better understanding of communication processes and the function of the mass media in society.
- m. To take a strong leadership role in serving the special needs of women, minority, disadvantaged, disabled, and non-traditional students.
- n. To investigate and inventory the state's rock, mineral, water, soil, biologic, and climatologic resources and coordinate topographic mapping as a base for economic development, resource and environmental management, construction and siting, resource and land use policy and education.
- o. To expect scholarly activity, including research, scholarship and creative endeavor, that supports its programs.
- p. To cooperate with public and private agencies, associations, and professional groups in sponsoring, developing, and/or providing access to educational programs to meet the needs of Wisconsin citizens. This cooperation shall be achieved in ways consistent with the missions and roles of the UW System and other state and federal agencies.

The following mission statement is an abbreviated version of the preceding statement that is used by several county offices

With an office in each Wisconsin county, Cooperative Extension develops practical educational programs tailored to local needs and based on university knowledge and research.

County-based Extension educators are University of Wisconsin faculty and staff who are experts in agriculture and agribusiness,

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community and economic development, natural resources, family living, and youth development.

Extension county-based faculty and staff live and work with the people they serve in communities across the state. Extension specialists work on UW System campuses where they access current research and knowledge. Collaboration between county and campus faculty is the hallmark of Cooperative Extension in Wisconsin.

Cooperative Extension partners with local, county, state, and federal government to address public issues. Faculty and staff plan and carry out programs with a wide array of community partners-- volunteers, business and educational groups, and advisors.

Using state-of-the-art technology, Wisconsin's Cooperative Extension brings educational programs to even the most remote parts of the state. Communication and computer networks link county Extension offices and UW campus departments with other universities, state and federal agencies and other sources of knowledge and information around the world.

Several program areas have also crafted their own mission statements:

The Family Living Program Area Mission is:

UW-Extension Family Living Programs provide education promoting family strengths and help communities become positive environments for family life. Programs respond to community needs with research-based education and partnerships that support Wisconsin families and communities

The 4-H Youth Development Program Area Mission is:

4-H Youth Development: A catalyst for positive community youth development.

Several administrative units also have mission statements. Check out the mission statement for the Cooperative Extension Distance Education - Digital Media Unit at the following URL:

<http://www.uwex.edu/digital/mission.html>

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Many county Extension offices also have mission statements. The following examples are illustrative of the statements currently available on the WWW sites maintained by the county Extension offices.

Grant County

Extending the resources and knowledge of the University of Wisconsin System to the people of Grant County is the mission of the Extension team. The educational mission of UW-Extension is based on the "Wisconsin Idea". (i.e., the boundaries of the University are the boundaries of the state).

Waukesha County:

The mission of Waukesha County University of Wisconsin Extension is to deliver research based information to improve the quality of life for families in the areas of family living, youth development, community resource development, agriculture, and horticulture. U.W. Extension provides community based education for families, business, government, and organizations using non-traditional educational methods.

Waupaca County:

The goal of UW-Extension is to make the resources and knowledge of the University system available to the residents of all counties. Waupaca County UW-Extension educators provide leadership and teach non-tuition classes in informal settings including lecturing, counseling, and demonstrations. Programs are offered through satellite, educational teleconference network (ETN), newspaper, and publications."

Several program teams also prepared mission statements to guide their work. Check out the following URL's:

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Mandates:

Mandates:

Cooperative Extension programs at the federal, state, and county levels are required to comply with a number of state and federal laws and administrative rules. Mandates for Cooperative Extension programs are provided in the following:

Morrill Act – 1862

Established fifty-one land-grant universities such as University of Wisconsin – Madison

Hatch Act – 1887

Established agricultural experiment stations in connection with the state land-grant universities.

Morrill Act – 1890

Established sixteen predominately black land-grant universities such as Alabama A&M University and extended land-grant status to Tuskegee Institute.

Smith-Lever Act – 1914, 1953, 1955, 1962, 1972, 1980, 1985, 1988
Established the Cooperative Extension Service and required “ a full and detailed reporting of its operations.”

Title VI, Civil Rights Act of 1964

Specifies that no person in the U.S. shall, on the basis of race, color, religion, sex, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance. Proactive measures to assure equal opportunity are mandated in Title VI of the Civil Rights Act of 1964. These Affirmative Action activities are undertaken to make up for historic and continuing discrimination and the continuing impact of historical discrimination. In Cooperative Extension, Affirmative Action efforts should continue until program participation by underrepresented minorities reflects proportionate representation in the population of potential recipients.

Title XI, Education Amendments of 1972

Prohibits discrimination against individuals in federally funded programs or activities, and in every aspect of programs and employment because of their gender. Title XI provisions include prohibitions against male/female job-related stereotyping, sexual

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harassment, unequal opportunities for training, advancement and other benefits of employment.

Food and Agriculture Act – 1977

Required the USDA to submit a comprehensive evaluation of the Cooperative Extension Service.

Food and Agriculture Act – 1981

Authorized USDA to conduct a regular evaluation of research, extension, and teaching programs.

Government Performance and Results Act – 1993

Required stakeholder involvement and the development of strategic plans by 1998. Reports containing numerical measurements of the achievement of performance objectives compared to goals by the year 2000

Morrill Act – 1994

Established twenty-nine tribal college land-grant institutions such as the College of the Menominee Nation and the Lac Courte Oreilles Ojibwa Community College in Wisconsin.

Department of Agriculture Reorganization Act – 1994

Established the Cooperative State Research, Education, and Extension Service (CSREES) to coordinate USDA and state cooperative agricultural research, extension, and education programs.

Americans with Disabilities Act Title II:

Program Access, prohibits public entities from discriminating against or excluding people from programs, services or activities on the basis of disability.

Wisconsin State Statutes 59.56 - Cultural affairs; education; recreation:

A (county) board **may** establish and maintain an educational program in cooperation with the University of Wisconsin referred to in this subsection as "University Extension Program." ... The committee on Agriculture and Extension Education is delegated the authority to formulate and execute the university extension program (in the county). Current interpretation of this statute may also include the County Executive and other administrative structures within county government. This process is referred to as the county oversight structure.

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Wisconsin State Statutes

Wisconsin law prohibits discrimination in educational programs, services, activities, courses, and facilities based on the following: ancestry, marital status, creed, sexual orientation, pregnancy, genetic testing, parental status, political affiliation.

UW-System and UW-Extension Policies and Procedures

UWEX Cooperative Extension Policies and Procedures

Academic Department Policies and Procedures

County Government Policies, Procedures, and Rules

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Vision:

Vision:

Vision statements should provide an "ideal and unique image of the future."

The following vision statement for Wisconsin Cooperative Extension was prepared by a representative group of faculty and staff colleagues in August 2000.

Wisconsin's educational network for engaging people and their communities in positive change.

Several program areas have also prepared their own vision statements.

4-H Youth Development:

UW-Extension 4-H Youth Development integrates research, education, and community-based partnerships, enabling youth to learn and practice skills to be productive citizens.

Family Living:

UW-Extension Family Living Programs is a leader in education and a valued partner in the implementation of strategies to achieve family and community goals.

Administrative units such as the Learning Institute for Nonprofit Organizations have their own vision statements:

The Learning Institute for Nonprofit Organizations serves as the global gateway to high-quality, affordable and accessible educational opportunities

County Extension offices have also developed their own vision statement. Examples include:

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Core Organizational Values:

Core Organizational Values:

The following Cooperative Extension values were identified by a representative group of staff, faculty, and administrators at a statewide meeting on August 2-3, 2000:

- **Research, scholarship and community knowledge.** We apply research to address local issues and concerns. We hold ourselves accountable for the highest standards of scholarship. We respect and apply the knowledge of the people we serve.
- **Local needs and interests.** We build the capacity of citizens to engage in the public work that helps them solve their own problems. The local community provides the context for our work. To address local needs, our continuing local presence is vital.
- **Excellence and innovation.** We explore new approaches to meeting educational needs. We demonstrate the highest standards for program quality and effectiveness.
- **Partnerships.** We seek partnerships with county, tribal, state, and federal governments, private and public organizations, campus and county staff, volunteers, and community residents. Our success depends on shared interests, responsibility, resources and recognition.
- **Honesty and Integrity.** We are stewards of the public's trust and resources. We create respectful, supportive work environments by acting on our organization's values.
- **Diversity.** We seek diversity in our faculty, staff and clientele and welcome differences in people, ideas, programs, and partnerships.
- **People are our most important resource.** We continuously improve the practices that enable us to hire and retain the highest quality workforce. We embrace open communication and strive to improve our workplace.

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Core Leadership Values:

Core Leadership Values:

A survey of core leadership values of Cooperative Extension faculty and staff was conducted in January and February of 2000. The survey was based on the work of Kouzes and Posner noted in pages 19-31 of their book *The Leadership Challenge*. Six hundred surveys were distributed and 540 were completed and returned.

The leadership values most preferred by Cooperative Extension staff include:

- 1. Honest (trustworthy, truthful, reliable)**
- 2. Competent (capable, qualified, skillful, effective)**
- 3. Fair-minded (just, objective, unbiased)**
- 4. Broad-minded (open, flexible, receptive)**
- 5. Dependable (reliable, conscientious)**
- 6. Supportive (helpful, championing, comforting)**
- 7. Forward-looking (visionary, future-oriented)**

Copies of the complete report, *What Cooperative Extension People Valued in their Managerial Leaders* is available on the Cooperative Extension website at the following URL:

<http://www1.uwex.edu/ces/admin/committees/committee.cfm?CommID=7>

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Objectives / Goals: Organizational, Team, and Individual

Objectives/Goals:

The initial list of Cooperative Extension organizational, team, and individual objectives and goals was identified by a representative group of staff, faculty, and administrators at a statewide meeting on August 2-3, 2000. In the months that followed additional input was sought from Cooperative Extension faculty and staff. The final list of objectives and goals was further adapted and approved by the Cooperative Extension Administrative Committee in 2000. The list that follows is presented from an organizational perspective. The list should be viewed as an organizational benchmark that should be considered as a starting point for the development of objectives and goals at the program area, team, department, and individual levels.

The Cooperative Extension Objectives are:

1. Quality Educational Programs

We are known by the quality of our educational programs. Our programs match university resources to local needs. We use technology to give learners access to quality learning experiences. We provide educational programs for the changing needs of Wisconsin's population and have the skills and resources to evaluate our own work. We contribute to the scholarly work of the university.

2. Quality External Relationships

Our continuing success depends on our ability to maintain strong, cooperative relationships with long-term public and private sector stakeholders and to build new partnerships based on shared interests.

3. Quality Work Life

Recruiting, hiring, and maintaining the highest quality work force is key to our ability to address the educational needs of Wisconsin residents. We position our faculty and staff as the educational leaders of the 21st Century by providing professional development and intellectual challenges. Our workplaces are client centered, exciting, and supportive places.

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Goals have been identified for each of the preceding objectives:

1. Quality Educational Programs - Goals

Divisional Goals:

- A. Each program will develop programs, materials and professional development that builds the capacity of faculty and staff to work with culturally and ethnically diverse audiences.
- B. By 2002, all program teams will document progress toward goals in the team evaluation plan. Teams will have the evaluation capacity to design and implement effective program evaluation strategies using the logic model framework.
- C. By 2002, all faculty and staff will have the opportunity to be a member of a program team.
- D. By 2005, 90 percent of faculty and staff will have access to appropriate technology and the skills they need to use technology to enhance program delivery.
- E. By 2003, faculty and academic staff will be offered at least one opportunity to share scholarly work in an academic department setting or in another venue.

Team goals

- F. By 2001, and every year after, program teams or county office teams will document significant progress toward carrying out their work plan.
- G. County office teams will conduct a multi-year process for assessing local educational needs and will review and update information yearly. The process will specifically address the needs of people protected by civil rights laws and other traditionally under-served audiences.

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Individual goals:

- H. Share their scholarly work with peers in Wisconsin, the region, or the nation.
- I. By 2003, faculty and staff will demonstrate reasonable efforts to reach out to all county residents.
- J. By 2001, using the logic model framework, faculty and staff will share the impact of a significant innovative program. The innovation can be a new idea, new educational approach, new audience reached, the development of new knowledge, or adapting new research or innovations to program development.

2. Quality External Relationships - Goals:

Divisional Goals:

- A. By 2001, and each year after that, at least 80 percent of local, state and federal elected officials will recognize the value of Cooperative Extension programs and act on those convictions.
- B. By 2005, Cooperative Extension will increase funding by 10 percent from all sources and maintain the real dollar value of county, state and federal base funds. We will evaluate funding partnerships yearly and decide which to maintain and strengthen, and which to end.

Team goals:

- C. By 2002, 90 percent of county, tribal and statewide units will create a plan for external relationships with elected officials and stakeholders.
- D. By 2004, county, tribal and statewide units will identify and assess their working relationships with other governmental departments and develop a plan for establishing additional relationships with county, governmental or non-governmental units.

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Individual goals:

- E. Starting in 2002, faculty and staff will document a significant partnership that results in reaching a new audience or securing additional fiscal or human resources for Cooperative Extension programs. The partnership should reflect the diversity found in the community.
- F. By 2001, and every year after that, faculty and staff will make a significant contribution to the county's external relations plan.

3. Quality Work Life - Goals:

Divisional goals

- A. By 2005, Cooperative Extension's workforce will have the same proportion of people of color as relevant job pools.
- B. By 2005, all Cooperative Extension faculty and staff will report a satisfactory balance between work and personal life.
- C. By 2003, Cooperative Extension's career development system will orient new employees and offer core competency professional development for all employees.
- D. By 2002, and every year after that, at least 25 percent of professional development will target new, cutting edge information, approaches, or technologies. Professional development that responds to emerging local needs will be available on demand.
- E. By 2005, ten faculty and staff will participate in a sabbatical or other in-depth professional development experience.
- F. By 2003, all department heads will have completed a training program specifically for department heads. After 2003 and annually, 20 faculty and staff who are not department heads will receive professional development in the department-head curriculum.

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Team goals:

- G. By 2004, members of county, tribal and state work units will identify their work unit as an exemplary work team.
- H. By 2003, all faculty and staff will work in a respectful, inclusive environment.

Individual goals:

- I. By 2002, all employees will develop and carry out a professional development plan focusing on individual needs, with the plan updated yearly.

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Work with your department / unit colleagues to prepare a mission statement, vision statement, objectives, and goals for your department/unit. Identify any additional mandates that your unit is required to follow.

To be developed.

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Role model the core organizational and leadership values that Cooperative Extension faculty and staff want their leaders to demonstrate.

Role Model:

Kouzes and Posner provide an excellent overview on the importance of a leader / manager modeling the core organizational and leadership values. Please review again pages 209-241 of the in their book, *The Leadership Challenge*. On your rereading of the section, note the "big" and "small" things that are important in setting the example and "doing what you say you will do".