



University of Wisconsin-Extension  
Cooperative Extension  
Program Development and Evaluation

# **STATEWIDE PROGRAM PLANNING: AN EVALUATION OF THE 1999 PROCESS**

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## Executive Summary

Every four years, UW-Extension engages in a comprehensive statewide program planning process to identify statewide issues and educational priorities. To prepare for the upcoming planning process, an evaluation was conducted of the 1999 process. Email surveys were conducted with department heads and statewide program teams and focused discussions were held with program leaders and the 1999 statewide planning committee co-chairs. The results provide many insights about the strengths and challenges of statewide program planning. A few are highlighted below clustered by the questions that focused the evaluation:

*Which of the materials and procedures provided in 1999 should be used again?*

- The trends analyses that were written by county staffs and specialists were used most frequently and helped to build relationships between the two groups. A number of the materials provided in 1999 continue to be used.
- County offices appreciated, and want repeated, the opportunity to choose the planning procedure to suit their situation, including the use of existing data and/or assessment rather than starting anew or duplicating the efforts of others.

*What were strengths/weaknesses of the local planning process?*

Strengths:

- From the county office perspective, the major strength of the 1999 local planning process was the flexibility it provided for county offices to create their own planning process.
- Local planning created opportunities for interaction with local stakeholders. Nearly two-thirds of the county offices reported satisfaction with their efforts in reaching out during the 1999 planning process; others need and want help in reaching diverse audiences and non-Extension users.
- Adequate time was allowed for preparation and implementing the planning process at state and local levels. Listening sessions and district trainings built a vision and understanding of the whole planning process.
- Seventy-eight percent of the 51 responding county offices reported satisfaction with the data that they collected; there were no additional data they wished they had collected.
- Local planning resulted in a variety of additional benefits: changing or refocusing programs; identification of the unique contribution Extension provides at the county level; visibility; identification of new partners and new audiences, team building, validation of existing programming; building support and buy-in of county committees. Few county offices gained media attention as a result of the planning process.

Weaknesses:

- Submitted data were difficult to use and interpret for statewide planning and priority setting because the data were collected in various ways and submitted at differing levels of specificity.
- Local issues were not prioritized and lacked contextual information to facilitate interpretation.

- Concerns were expressed about the representativeness and quality of the collected data.
- Local relevancy of data was compromised when it was consolidated into a statewide issue, making it difficult for counties and individual faculty/staff to identify with the state issue.
- There was the need for stronger specialist and administrative support and understanding of the planning process, particularly program leaders.
- County and team respondents called for greater clarity in terms of what data are needed and how it should be reported back to the state: type of data, level of specificity, format and vocabulary to use.
- Local flexibility meant that county offices varied in the extent to which they engaged in a total office planning process versus a program area process.

*How were locally generated data used?*

- All county offices used their data to develop local programs.
- Ninety percent used their data with other agencies/partners; 64% used their data in grant writing; 55% used their data in tenure documentation.

*To what extent do teams use locally generated planning data; are they functioning as program development teams?*

- Teams look and function differently by program area and had different expectations related to their use of local planning data.
- Forty percent of the 19 teams that responded didn't "really use the data much"; thirty percent felt that the data were not helpful in setting team priorities. In general, teams had difficulty integrating the county data given the quantity of data and its inconsistency in form and level of specificity. Many and varied factors influence team program priority setting including team membership and interests, team history, ongoing work, legislation, national initiatives, external factors such as prices and markets, potential partners and partner demands, funding and resource availability, etc.
- Fifty percent of the 18 teams reported that workgroups formed around issues identified by the data; 40% reported that workgroup involvement was stimulated; 20% indicated that new teams/centers formed.
- Teams most frequently found the data useful in identifying common concerns across counties, for stimulating discussion, helping to identify priorities and affirming ongoing programs.
- Some teams reported inadequate membership to really perform as program development teams.

*How did the planning process create visibility and partnerships for Extension?*

- Nearly half of the responding county offices reported that their office gained visibility.
- Forty percent reported that they identified new partners as a result of the 1999 planning process.
- A variety of missed opportunities were reported: using the planning process in ongoing education and marketing about Extension; sharing the process and results with state partners and stakeholders; engaging stakeholders in meaningful ways during

planning and then continuing that engagement afterwards; integrating diversity and civil rights more purposefully in planning.

Various respondents expressed the need and desire to systematize planning into an ongoing process versus a once-in-four-year administrative requirement. The results from this evaluation study reinforce the value of the planning *process* as well as the *data generated and its use*. Greater clarity around the multiple purposes and benefits of statewide planning may be appropriate with expected end results and tradeoffs articulated.

## BACKGROUND

Every four years, UW-Extension engages in a comprehensive statewide program planning process to identify statewide issues and educational priorities. Before beginning the next process in 2003, the Associate Dean requested an evaluation of the past process to examine its strengths and weaknesses and to provide input for the next planning cycle. The evaluation was to address a variety of questions including:

1. Which of the materials and procedures provided in 1999 should be used again?
2. What were strengths/weaknesses of the local planning process?
3. How were locally generated data used?
4. To what extent do teams use the locally generated planning data; are they functioning as program development teams?
5. How did the planning process create visibility and partnerships for Extension?

Program Leaders were each asked to appoint two members to the evaluation team; an evaluation specialist served as chair. This team met seven times during August-December 2002 via teleconference to determine the evaluation design, construct the survey questionnaires and group interview protocols, and review progress of the data collection (see Appendix A for full evaluation proposal).

## METHODS

The evaluation team reviewed the extensive materials created by the 1999 statewide program planning committee (<http://www.uwex.edu/ces/archive/plan/>) and developed a series of data collection instruments. The team established the following definition of an “effective” program planning process that helped guide the data collection.

An “effective” program planning process is a process that:

- a) Generates credible data that is used for program planning and implementation.
- b) Involves a broad base of stakeholders (users and non-users).
- c) Builds partnerships (new and/or maintains/builds existing partnerships).
- d) Creates visibility for UW-Extension.
- e) Helps UW-Extension identify priorities and determine resource allocations.
- f) Identifies the unique contribution that Extension can make versus other providers.

Data were collected from four groups of individuals: department heads, statewide program teams, program leaders, and the 1999 statewide planning committee co-chairs. Department heads and statewide program teams responded to email surveys (see Appendix B for all instruments). These were distributed in October to 72 department heads and 29 statewide program teams. Three follow-ups were needed to obtain the following response rates: 70% response for department heads and 68% response rate for program teams (see Appendix C for list of respondents). A group interview was conducted with program leaders in late September to obtain their input. Likewise, a

teleconference interview was held with the two 1999 statewide planning committee co-chairs in late October.

## RESULTS

Because many people took the time to share their ideas for the next planning cycle, their written comments are included throughout this report and may be found verbatim in the appendices. It is expected that these comments will be helpful to the next program planning committee.

### **EMAIL SURVEY OF DEPARTMENT HEADS**

The following results are from 51 of the 72 counties (70% response). Department heads were asked to complete the questionnaire with input from county office staff who had been part of the 1999 planning process. A total of 154 county office members contributed. This is an average of three contributing to each returned survey, with a range of one to seven staff members providing input per county.

### **Did your office use the planning materials provided in 1999?**

A variety of printed materials were provided in a 3-ring binder titled *Program Planning 2000-2004*. These items are listed in Table 1 along with the percent of offices that used (and continue to use) the different planning materials. The *Trends Analysis* was used by nearly all the counties while the sample news stories were used least frequently.

Table 1. Use of 1999 planning materials

Planning materials	Offices that used		Continue to use (# of offices)
	#	%	
Trends analysis (n=51)	48	94%	18
Key data components (n=51)	36	71%	15
Planning matrix for identifying diversity (n=51)	34	67%	12
Tools (n=49)	31	63%	13
Video (n=51)	30	59%	3
Case examples (n= 51)	22	43%	4
Asset mapping tool (n=50)	10	20%	7
Sample news stories (n=51)	10	20%	4

## How useful were the planning materials?

For the offices that used the 1999 planning materials, the majority reported that they found each item “somewhat useful” using a 3-point scale of “very useful,” “somewhat useful,” “not useful.”

Counties provided suggestions for materials that would be helpful in the next planning process (see Appendix D). Requests that were mentioned several times included: keeping the same materials and procedures; the need for county and municipality demographics, census data and program-area specific data; and providing websites and web-based resources.

## Were the priorities that the county identified reflected in the statewide teams/centers within each program area?

Across all program areas, the responding counties felt that their county priorities were reflected in the state teams/centers (Table 2). The greatest congruence was reported for the family living program area and the greatest variability and lack of association was reported for the 4-HYD program area.

Table 2. Relationship of county priorities to statewide teams/centers by program area (% of responding county offices)

Program Area	A great deal	Somewhat	Not much or not at all
Agriculture	20%	64%	6%
Family Living	41%	48%	5%
4-HYD	20%	52%	20%
CNRED	29%	45%	4%

Note: Percents do not add to 100% since a few counties chose the “don’t know” option.

## What worked well with the planning process you used in 1999?

Forty-seven counties provided written comments about what worked well for them. Many of their comments focused on:

- Flexibility of the 1999 planning process that allowed counties to create their own process.

- Use of existing data and/or assessments rather than starting anew or duplicating other efforts.
  - Particular method used by the county to collect their data (sample survey, key informant interviews, focus group, modified Delphi, etc.).
  - Integration of planning process into ongoing programming.
  - Involvement of a variety of people/groups in the process.
  - Adequate time given to implement the process.
- County office working together as a team.

For a complete listing of their suggestions, see Appendix E.

### **What didn't work so well?**

Problems that counties encountered centered on the following:

- Amount of time and energy (and costs) it takes to conduct good planning.
- Difficulty in getting people to participate, particularly non-Extension users.
- Concerns about representativeness of the collected data in light of sample, geographic areas that weren't included and who did or did not participate.
- Inadequate specificity of local input making it difficult to interpret and set direction.
- Lack of cross-program-area planning.
- Timing of the process—difficult to conduct in summer and early fall.
- Varying levels of county staff commitment.
- Lack of understanding by state specialists and administrators about suggested procedures.

For a complete listing, see Appendix F.

### **Do you feel you did as well as you'd like in reaching and engaging the diversity of your county? Users and non-users?**

Nearly two-thirds of the county offices reported satisfaction with their efforts in reaching out during the 1999 planning process.

- Sixty-seven percent of the responding offices reported that they did as well as they wanted in reaching and engaging the diversity of their county.
- Sixty-five percent reported satisfaction with reaching and engaging users and non-users of Extension.

Some county offices, however, need and want more help in reaching diverse audiences and non-Extension users. See Appendix G for their narrative comments.

**What suggestions do you have so the statewide planning process can allow localized county planning but still collect data that can be used for setting state priorities?**

This is an important question and one that challenges each statewide planning committee. Procedures for local planning need to be flexible to fit the local context, but the resulting data are often a “mix of apples and oranges,” making the identification of statewide priorities difficult. Local issues are inherently more specific than statewide priorities.

In general, county offices want the flexibility that was provided in 1999 to conduct local planning that fits their context. Many request that the process not be changed and that counties be allowed to choose among alternative methods and tools. In particular, counties want the option to capitalize on existing data and county planning processes. A number of offices, however, indicated that greater clarity be provided in terms of what the state expects to receive, deadlines, format and vocabulary to be used. Then, they request that counties be allowed to determine their own best way to proceed.

Specific ideas that county offices provided about ways to address the need for local flexibility and statewide priority setting included:

- Consider planning on a regional basis; regional issues exist that could be incorporated into a statewide plan.
- Include 2-3 questions on each trend sheet that could be used in the local survey.
- Separate local and state planning: Use statewide survey and focus groups for statewide priority setting; let counties follow their own process.
- Increase coordination at local and state level across agencies.
- Collect data specific to all four program areas.
- Use an outside agency to randomly survey all 72 counties to provide county and statewide data.
- Keep concepts broad so that specific ideas can be captured within the broader concepts.
- Use greater consistency in tools used for collecting data; provide limited range of collection/reporting tools
- Ensure that local feedback gets to specialists to help direct their research and programming.
- Ensure that all state specialists and administrators understand the procedures and recommended approach.
- Allocate resources for planning.

## **Did you use the county planning data for other purposes than to send to the state level?**

Nearly all the counties (92%) found other uses for their data. These counties used their data in these additional ways:

- One hundred percent used their data to develop local programs.
- Ninety percent shared their data with other agencies/partner.
- Sixty-four percent used their data in grant writing.
- Fifty-five percent used their data in tenure documentation.

## **Was there any information that you wished you had collected?**

Seventy-eight percent of the county offices reported that there was no additional information that they wished they had collected.

The ten counties that wished for other information saw the need for:

- Data from specific geographic areas that were not included.
- More specificity in the data; that is, specific outcomes that people wanted.
- More census information.
- Possible action steps for identified needs.
- Ways to be more visible and effective in reaching new audiences.
- More information from younger people, ages 13-20 and 21-30.
- Program area specific data; e.g., youth development.
- Economic value people place on programs.
- Greater return (response rate) and sorting by category such as age, service in county government, etc.

## **How does your office deal with local needs that do not result in a state response?**

Most of the 45 counties that provided written comments to this question responded that they usually developed programs to meet the local needs identified. “We did them anyway.” “We do this all the time.” “We offer the local programs that we need.” In some cases this meant finding their own resources, using available resources or writing grants, using curriculum from other states and sources, partnering with local agencies, networks and coalitions to get the work done, relying on specific specialists or local expertise. Some issues were referred to other more appropriate agencies and people. In two cases, county offices reported that the needs identified through the county planning process were ignored by a particular program area or dropped.

## What other benefits accrue from engaging in local planning?

The evaluation team assumed that various potential additional benefits accrue from engaging in a local planning process, such as the identification of new audiences and new partners, changes in programming, media attention, more visibility for existing programs, and identification of Extension's unique contribution. The extent to which these additional benefits actually accrued for the counties were reported as follows:

Refocus or change programming: The largest number reported that the 1999 planning process influenced their programming direction: Sixty percent (28 counties) said that the planning process helped them refocus or change their programming.

Unique contribution. Fifty-two percent (25 counties) felt that the 1999 planning process helped identify the unique contribution that Extension can make versus another provider.

Visibility for existing programs. Nearly half of the county offices (23 offices or 49%) reported that the 1999 planning process helped their county office gain visibility for existing programs.

New partners: Forty percent (19 counties) reported that they identified new partners as a result of the 1999 planning process. New partners included: Wisconsin manure haulers; law enforcement; courts; ATOD professionals; UW campuses; youth serving agencies; Urban League; League of United Latin American Citizens; local alternative health groups; local farm supply cooperative; local public health agencies; variety of community agencies.

New audiences. Thirty-six percent (18 counties) reported that they identified new audiences as a result of the 1999 planning process. These new audiences included: home-schooled youth; Anabaptist communities; Hispanic communities; classroom teachers; elementary principals and counselors; local policy makers outside elected officials; EvenStart parents; CNRED audiences as a new program area; women in agriculture, Amish; DSS; youth groups.

Too many partners, however, may be a challenge. One county responded that it has so many partners that it needs to look at quality and quantity.

Media attention. Few of the offices (7 offices or 15%) reported that the program planning process helped their county gain media attention.

Besides the above listed benefits, 40% of the county offices reported that there were other benefits as a result of the 1999 planning process. Benefits noted in their written comments included:

- Team building, county office working together; especially beneficial for new staff; time to reflect.

- Helped inform Extension education committee, leading to greater buy-in and greater association with statewide process; opportunity to share outcomes with county Board of Supervisors.
- Validated existing programming.
- Brought to light educational needs of underserved.
- Helped staff identify county needs and priorities.
- Met other key players.
- Provided information for Civil Rights Review, County Board Reports; planning and reporting.
- Resulted in search for grant dollars.

Twenty-six percent of the responding offices also reported negative consequences as a result of the 1999 planning process. Most frequently this focused on the time-consuming nature of planning and the difficulty counties had integrating planning into already full schedules, particularly in small offices where resources were limited.

Other written comments included:

- Criticism from county partners/individuals: wasteful bureaucrats.
- Disappointment when people provide input about issues that are important to them and then Extension does not act on them.
- Process was driven by an evaluation approach rather than planning approach (e.g., logic model) involving change in terminology that was not well understood.
- One program area had few or no issues raised.
- New programs added without being able to extricate from ongoing programs.

### **To what extent do you think the 1999 planning process generates credible data that is useful in program planning?**

More than 90% of the offices felt that credible, useful data were generated in the 1999 planning process; 14% reported “a great deal” and 78% reported “somewhat.” Eight percent (4 offices) did not think the planning process provided credible, useful data.

Added written comments included:

- You get more specific data locally and then it sometimes gets lost when you need to consolidate the issues statewide. Sometimes you get issues that are controversial and only one side is pushed by an Advisory Committee member present. You ask for the most pressing issues and often they fall outside the traditional program areas and sometimes the response doesn’t have a good link to education. This isn’t all bad, but specialists may find that what they have as a priority doesn’t show up and then what do they do? And what do agents do with no specialist support for program development?
- For the most part, the data generated was consistent with where our programming was happening.

- A number of the issues identified were in areas where our office staff does not have the capacity to respond...primarily in the CRD area where we have no agent.
- A comprehensive planning approach across all agencies is needed

It would be instructive to look at the four offices that did not think the planning data were credible or useful to seek explanation and understanding.

**To what extent do you think county stakeholders view Extension planning as providing credible planning data?**

The results were somewhat more variable for this question. Eighty percent of the offices felt that county stakeholders viewed Extension planning as providing credible planning data: 34% reported “a great deal,” and 47% reported “somewhat.” However, 19% (nine counties) did not think county stakeholders viewed extension planning as providing credible data. Written comments included:

- The process got lost in all the other information; time was a factor.
- No matter what we tell/show them, county board members have their own ideas about what is needed; what we should be working on; what the priorities are, etc.
- They seem oblivious; many would prefer action to planning.
- Because of the method used, not sure the connection was made.

**What other factors, besides local planning data, affected your county program priority setting?**

In the written comments to this question, counties most frequently mentioned the influence that existing programs had on priority setting. Other factors mentioned included (in descending order of frequency):

- Regulations, legislation, mandated services.
- Agent interest/staff situation.
- County board/government priorities.
- Other local planning initiatives.
- Unexpected changes.
- Resources available.
- Existing needs.
- Input from clientele groups, contacts.
- Partner demands.
- Natural disaster, tenure needs, school and business input.

## **EMAIL SURVEY OF PROGRAM TEAMS/CENTERS**

An email survey was distributed to all 28 program areas teams/centers in September 2002. Table 3 shows the response rate by program area. The listing of all teams and response is found in Appendix C.

Table 3. Response to email survey by program area.

Program Area	Number of teams	Response to survey	
		#	%
Ag and Natural Resources	14	9	64%
4-HYD	5	4	80%
Family Living	3	3	100%
CNRED	6	3	50%
<b>TOTAL</b>	<b>28</b>	<b>19</b>	<b>68%</b>

For the 19 teams that responded, ten formed as a result of priorities set from the 1999 program planning process and nine existed at the time of the planning process. For the latter, four of the nine reported changes/redirection/refocusing as a result of the planning data.

### **How did your team use the data?**

Just over 40% of the responding teams reported that they “really didn’t use the data much” (Table 4). Only the three family living teams reported using the data and discussing the county data as a team. The limited use of the county data by the CNRED teams was probably due to the fact that CNRED used an all faculty conference in February 1999 to identify statewide priorities, rather than the county planning data. Strategic issues were identified at the all-faculty conference and teams were formed primarily for reporting. The county data affirmed and validated the issues that had already been identified.

Table 4. Use of county planning data by teams

How used	% of teams	Breakdown by program area (% of teams responding)			
		AG	4-HYD	FL	CNRED
Didn’t really use	42%	38%	25%	0	67%
Team members individually looked at the county data	42%	16%	50%	66%	33%
Discussed county data as a team	32%	5%	50%	100%	0
Tried to build team’s work on county data	26%	10%	50%	33%	0

## **To what extent did county planning data help determine the team's priorities?**

Twenty four percent of the responding teams reported that the county planning data helped “a great deal” in determining team priorities. Nearly half (47%) of the teams reported that the data helped “somewhat.” Thirty percent of the teams felt that the data was not helpful in setting team priorities.

All three family living teams reported that they used the data “somewhat.” For the other program areas, there was considerable variation in how helpful individual teams found the data, so no generalizations or comparisons across program areas were possible.

## **What was useful about the data?**

Teams were asked to indicate what they found useful about the data (Table 5). Teams most frequently found the data useful in identifying common concerns across counties, for stimulating discussion, helping to identify priorities and affirming ongoing programs.

Table 5. Usefulness of county planning data to teams

Ways county data might be useful	% of teams (n=19 teams)
Identified common concerns across counties	55%
Stimulated discussion	50%
Helped to identify priorities	40%
Affirmed ongoing programs	40%
Helped identify resources needed	15%
Helped identify new partners	10%
Helped identify new audiences	10%
Helped to refocus the team/center	10%
Helped to generate media coverage/publicity for team/center	0%

### **What would have made the data more useful to your team?**

Responses to this open-ended question indicated that the teams had difficulty integrating the county data given the “abundance of the data” that came in varied form (some specific and some very general). The data were collected in different ways and often without the necessary contextual information to make interpretation possible. One team recommended that the data be categorized by common elements. Another team recommended that the data be more carefully processed and organized.

Please see Appendix H for verbatim comments.

### **Was there information you wished you had in order to set team priorities?**

Few teams provided comments to this question. Those that did suggested that greater consistency in the language used and the way data came from the counties would be helpful. A list of staff names of people interested in the topic would also be of value. One team recommended that there be a mechanism (possibly on the UWEX website) for the ongoing tracking of issues or a district meeting committed to brainstorming about the issues/trends noticed by county-based staff.

Another team suggested greater use of computers to add depth to the data available for planning; for example, national trends and government reports. One of the commodity-specific Ag teams reported that information needed by producers to make business decisions is largely in the hands of private companies so the team is limited in what it can set as priorities.

### **Besides county planning data, what other data does your team use in program development?**

To this open-ended question, teams most frequently mentioned input from specialists/agents/team members as influencing program development. Other frequently mentioned factors included: needs and interests of external partners as well as existing curricula and resources. Additional comments included national trends/agendas, clientele input, past work, current research, and availability of potential partners.

## What were other positive outcomes of the 1999 planning process?

Besides providing data for program direction setting, it was expected that other benefits might accrue for teams such as those listed in Table 6. Just half of the teams reported that workgroups formed around issues as a result of the county planning data. Few reported the formation of new workgroups or teams/centers. One team offered that the information provided through the county planning process allowed the team to expand certain of its priorities.

Table 6. Other positive outcomes from the 1999 planning process

Outcome	% of teams who indicated this outcome
Workgroups formed around issues as identified by the data	50%
New people joined the team/center	45%
Team/workgroup involvement was stimulated	40%
New workgroups formed	30%
New teams/centers formed	20%
Teams/workgroups helped streamline data that helped counties focus on priority issues	5%

## What didn't work so well? What improvements would you suggest?

As anticipated, teams reported a variety of things that did not work so well and offered suggestions for improvement. Among other things, teams indicated that there was a need for stronger specialist support; a way to recruit and retain team membership; avoid the inclination to want to capture everything in a plan of work or to try to do too much—better to prioritize and simplify; a way to get general “buy-in” from Extension staff statewide to focus on a few priority issues versus individual interests. One team commented on the difficulty untenured faculty have in working in teams when individual contributions are rewarded. One team indicated that they need to rethink how to structure the work the team provides. Another team suggested that from the general planning session that identifies broad priorities and emphases, there might be a separate process for more focused team planning. See Appendix I for all comments.

**To what extent did the planning process generate credible data that was useful in statewide planning?**

Of the 13 teams that answered this question, most felt that the 1999 planning process generated credible and useful data. The results follow:

- One team reported “A great deal.”
- Nine teams reported, “Somewhat.”
- Two teams reported, “Not much
- One team reported, “Not at all.”

These results are slightly lower than those reported by the counties (see page 12).

**What other factors, besides local planning data, affected your team/center program priority setting in 1999?**

Responses from 13 teams to this open-ended question were clustered as seen in Table 7. Few of these factors were mentioned by more than one team, suggesting the number and range of factors that influence program priority setting.

Table 7. Other factors affecting team/center program priority setting

Factor affecting priority setting	# times mentioned
Ongoing work	4
Current research	2
Legislation: current, pending	2
National initiatives	2
Staff/team member interests	2
Existing curriculum	1
Agent perceptions of needs	1
Environment—prices, markets, etc	1
Elected official priorities	1
Funding availability	1

**What suggestions do you have so that the statewide process can allow variation for localized county planning but still collect credible data for use by teams for setting priorities and program development?**

Ten of the 19 teams offered written comments to this open-ended question, though not all were actual suggestions for improving the process (see Appendix J). Central themes from the comments included: the need for clear leadership from the administration/program area; ensuring adequate numbers in team membership (teams can

be too small to be viable); providing parameters, perhaps uniform questions to ensure greater consistency; recognizing that county needs are very localized and that statewide planning must be responsive to local needs; the need for personal interaction; allowing centers to design their own planning and evaluation process; providing local data to teams by regions (regional approach); developing criteria for selecting which data collection process to use with pros and cons of each process; providing specific expectations of how each county reports data/issues back to the state; having counties include contextual information around the identified issues; staying focused on UWEX mission versus trying to do everything; asking for information on current funding streams/contracts/commitments within counties that may force certain issues to be addressed and the university to respond.

## **Other**

Several teams questioned the value of this evaluation and the time it takes for people to respond. They felt that it would have been better conducted within a year of the planning process rather than three years later.

## ***PROGRAM LEADERS' DISCUSSION, SEPTEMBER 2002***

The program leaders spoke about the value of the planning process. They see it as a way to formally engage local people and help see Extension's relevance in their lives. In the words of one, "It is what we hang our hat on—it shows that our programming is grounded in the needs and concerns of the state."

Yet, there was concern expressed about the quality and commonality of the data collected and its usefulness in setting program direction. Program leaders spoke about the essential need for flexibility and citizen input, but also acknowledged that data in 1999 were collected in very different ways. In the words of one, "Some counties prioritized, others didn't; some used broad-based stakeholder groups; others only had minimal constituent input. We ended up with apples and oranges." It was agreed that the county data provided general use and direction in 1999, but were not representative enough or consistent enough to use further. It appeared to be the program leaders' opinion that the county data served to affirm existing directions and existing teams. They considered the county data as one piece of the puzzle, but only one piece.

The program leaders asked about the intended audience of the plan and the planning. Who was to be reached? Was it a state, regional or a local audience? They commented that the needs of a local audience are specific and that the local audience wants data that are relevant to them. In contrast, state needs and a state plan are more global and general. Program leaders reported that it was often difficult for a county agent to link his/her local individual plan to a team plan because local specificity was needed. They felt that this will always be a challenge.

Program leaders also talked about missed opportunities, at both the county and state levels, for using the planning process in ongoing education and marketing about Extension. One member suggested that counties could continue to work with and provide follow-up to their planning groups, possibly through annual or bi-annual reviews and updates. They found the one marketing piece that was created from the statewide planning process useful. Program leaders shared it with other agencies. All agreed, however, that the planning process offered ongoing opportunities for marketing Extension that have gone largely unrealized.

Several program leaders recommended the use of advisory groups in the planning process. They were uncertain, however, about the extent to which faculty and staff understand and use advisory groups.

The following is a summary of what the Program Leaders recommended to keep and to change relative to the 1999 planning process:

- Keep a flexible, local process but provide parameters so that more comparable information results.
- Ensure that there is broad-based, user/non-user involvement. Some counties effectively reached out and involved broad stakeholder groups (users and non-users) in 1999. It was felt that this was probably associated with the comfort level the county had as an office and their expectation of follow-up with those groups. While the matrix might have been used by counties, they didn't have to report against it so there was no accountability for local involvement.
- Be more prescriptive about what is sent to the state; that is, prioritize the top ten issues with descriptions, etc.
- Expect the county offices to provide more follow-up and sustained contact with the input group; possibly check and re-check plans through annual or bi-annual reviews. Find ways to keep planning dynamic versus simply being a once-every-four-years activity.
- Put the department heads in a leadership role; provide training and support their leadership.
- Involve specialists. Consider them a stakeholder group. The 1999 process of specialists writing trends analysis with county colleagues was considered helpful; specialists weren't so isolated. One way to engage specialists who have their own vested interests may be to bring their special list to the discussion versus looking at trends in general.
- Prioritize: Feed data in by categories so that information can be pulled out more easily; structure the data input process so greater consistency in the output is possible.

Below are a few particular suggestions that came from the Program Leader meeting:

- Consider the 4-H centennial process and its national conversation that gained involvement, political strength, and visibility—all the criteria of an effective planning process. Such a conversation results in top priorities to provide focus.

- Consider organizing our planning process by program area/year. Each year a different program area would engage in a statewide conversation. It was felt that there was value in not doing all program areas at once so that Extension didn't become confused with all community issues.
- Encourage a more continuous and dynamic planning process. Engage staff and specialists in making constant adjustments. Possibly use the same broad group of people across program areas so that we are not just listening to/engaging ourselves.
- Consider planning with the other Extension divisions. Each division does its own planning but is this strategic, productive? The Chancellor is asking people to think in new ways. Is county-based planning the only way? Is a regional focus possible?

### ***TELECONFERENCE INTERVIEW WITH THE 1999 PLANNING COMMITTEE CO-CHAIRS, OCTOBER 30, 2002***

The two co-chairs wanted it clear that their input was based on their role in the 1999 program planning process—to get the planning process organized and off the ground. Others were responsible for implementing the process.

#### **What were major strengths of the 1999 process?**

The two co-chairs provided the following list of strengths:

- Interaction at the local level between county staff and local stakeholders.
- Liaison between district directors, the counties, and administration that enhanced Extension's work.
- Development of an organizational vision about planning; the roles that each plays in planning, and planning's role in Extension work.
- Opportunity to educate and/or re-educate staff about Extension's work. This is considered important given staff turnover.
- Building esprit de corps.
- Flexibility provided counties options that allowed for local creativity. It was also felt that this was a major weakness given the challenge to synthesize and draw commonalities across the state from individualized local data collection.
- Use of existing local planning process and data where possible. Many communities were engaged in or had completed various planning exercises: health, schools, Smart Growth. Many had excellent data. Taking advantage of data that already existed was emphasized.
- Preparatory training in every district that laid the whole planning process out in detail. It provided the opportunity for everyone to hear and provide input. It also showed administration's commitment.
- Listening sessions with specialists purposefully engaged the specialists. In the words of one co-chair, "This provided a powerful opportunity that drew all specialists together from the various campuses. It may have been the first and

last time they were in a room together.” Specialists were given the chance to see that they each had a role to play. As a result, it was felt that specialists perceived themselves differently; they created a group perspective that was powerful. The co-chair expressed uncertainty as to whether the full potential of these sessions was realized.

### **What were the challenges?**

The co-chairs talked about the need to find ways to engage stakeholders in meaningful ways during the local planning process. They were uncertain whether Extension had provided enough help to counties to think of ways to do this.

Another area that the co-chairs talked about was the involvement of the program leaders. They felt that the program leaders were not adequately engaged in 1999 and this resulted in a certain lack of coordination and understanding. The program leaders were presented with a process and they were expected to implement it. However, if they had been engaged from the beginning and if consensus had been built within the program leader group, then they might have had a common understanding of the process. To correct this situation, the co-chair suggested that the program leaders serve as an advisory committee to the planning committee.

A major issue discussed by the co-chairs was the need for Extension to find ways to engage in planning on a continuous basis, as part of programming and Extension work, rather than as an administrative requirement that is done once every 4 years. The co-chairs wondered how many counties go back and update their information or continue to use their planning data? It was felt that counties probably waited for the next four-year cycle and then did what was required.

The co-chairs also talked about the fact that the on-line Planning and Results System was new in 1999 and was being created and implemented at the same time as the planning process. This involved a major change in Extension that may have caused confusion for the planning process.

Following is a list of suggestions that the co-chairs offered:

- Resist the temptation to “fiddle” with the process and systems that are in place; doing so risks hurting the potential for planning to be seen as a familiar, reliable process.
- Use advisory boards to facilitate local planning and to keep planning dynamic and continuous. It appears that there is no common use of advisory groups at the local level; and if used, advisory boards may be constituted by program area rather than as a total county program advisory board.
- Reduce emphasis on program areas. There is a need to see Extension as a total county approach versus individual entrepreneurs. A focus on promoting the resources and education of the total Extension program—the “total team”—was explicit in the planning committee recommendations. It was one

of the operating principles. To model this, the committee conducted all training and interactions in cross-program area settings; no program area specific meetings or interactions were held.

- Don't confuse planning with reporting. Don't confuse planning with the management function of teams. Teams are a management construct, separate from planning. Teams aren't an outcome of local planning. Define teams, team development, program reporting and evaluation separately from the community planning process.
- Remember that the value of planning is the ability it gives Extension to be responsive and gain visibility. We need to ask: What does planning do for the community rather than what does planning do for the organization?
- Buy everyone lunch. Make time for developing personal relationships; take time to interact well with faculty.
- Hold face-to-face meetings of the planning committee. Don't expect to do everything via distance.
- Keep the process flexible and provide the opportunity for counties to be creative. Recognize that this will create challenges in having useable data for setting statewide priorities.
- Engage as an office team. This is a critical period in Extension's future and we must be seen as a total Extension office, not as individual educators competing with one another.
- Provide good lead time. In 1999, the planning committee had one year in preparation.
- The Associate Dean provided strong vision and leadership but then allowed flexibility for the process to develop and adapt as it evolved.
- Need a large enough group as the planning committee to provide coverage: program areas, campuses around the state, different geographic areas. The composition and effort of the planning committee demonstrates Extension's commitment to the process.
- Look at what worked and what did not work in each county and why to avoid the less successful planning processes. Don't tinker too much with the rest.

Finally, the co-chairs offered several additional comments. They stressed that planning is a role that Extension can carry out in communities. Both the process of planning (using and sharing trend data and statistics, collecting primary data, etc.) and the information obtained are valuable for others. Extension can serve as a "forecaster"—turning needs and concerns of the community into useful input for others where the community uses the data. In this way, one might consider the process as a community planning process rather than an Extension planning process. Through the process, opportunities are raised for Extension as well as for others.

They also stressed the importance of Extension's role in diversity and civil rights. They felt that it was important that the planning process make this stronger and more explicit. The racial and demographic profile of stakeholders needs to be applied to all situations—the advisory committee, respondents to a survey, etc.

Both co-chairs reiterated the importance of valuing the process of planning. They felt that to expect data coming from the planning process to direct programming might be too optimistic. Rather they saw the planning process as being instrumental in identifying trends and directions. The *process* of planning is its value—for both the community and the organization.

## SUMMARY AND RECOMMENDATIONS

- 1. Flexibility and localized planning.** All data suggest the importance of allowing counties flexibility to engage in a planning process that suits their locale and context. In 1999, counties could choose among several options that included: county advisory committee, county-wide mail survey, key informant approach, existing assessment, dual scan approach. A variety of tools and materials were supplied for each approach. Recommendation: Continue to support the approaches tested in 1999 that allow counties flexibility in their process; encourage counties to use existing data and/or planning processes as possible and appropriate.
- 2. Materials for planning.** Varied use and usefulness of the 1999 materials were reported. Trends analyses written by county staffs and specialists were used most frequently and helped to build relationships between the two groups. Recommendation: Review the materials that were used; update as necessary. Consider asking each county to report/submit its diversity matrix to establish accountability for reaching diverse audiences. Make greater use of the web: Put materials on the web versus in print; include other web sites for demographic data, census information, reports, national trends, etc. Include more county-specific demographic and census data.
- 3. Parameters and guidelines for reporting to the state.** To be useful for state priority setting and in team program development, the data need to be processed and organized differently. There is the need: 1) to know the issues (ranked by priority) for which it is really important for Extension to respond; 2) for contextual information around county issues; 3) for data to be submitted at the same level of specificity/generality across all sites. Recommendation: Provide greater clarity about what needs to be submitted by the county office to the state: the level of specificity desired; how it should be submitted; the desired syntax, format, language/vocabulary, etc. As noted above, however, allow county offices the flexibility to find their own best way to achieve the desired result that is articulated by the state. Perhaps, consider a two-staged approach that would allow for greater specificity of data at the local level and also broader state level themes. Explore the possibility of a regional approach as the unit of planning and analysis.
- 4. Ongoing planning.** A key result is that planning needs to be built into the fabric of programming rather than existing as an administrative, once-every-four-years requirement.

Recommendation: Expand efforts to embed planning into programming as part of program area responsibilities.

5. **Diversity and engaging stakeholders.** How to engage non-users in Extension program planning continues to be an issue for some.  
Recommendation: Identify counties that have done this well and share the lessons they learned. Require counties to submit their planning matrix to emphasize greater accountability.
6. **Advisory committees.** A number of respondents suggested that local advisory committees be involved in planning. Experience with advisory committees around the state appears varied; advisory groups may be constituted by program area rather than serving the total county office.  
Recommendation: Explore how advisory groups are currently being used, for what purpose and with what results. Consider how they might be more effectively used in the 2003 process. Additional assistance/tools for use with advisory committees may be necessary.
7. **Team use of locally generated data.** Teams varied in their use of the county data. This is due to a variety of reasons. 1) Teams look and function differently by program area. For example, the commodity-focused agriculture team (e.g., swine team) noted that its priorities are generally known; data producers need to use in decision making are in the hands of private companies. Consequently, this team did not expect the county-derived data to influence its programming very much. 2) Some teams had been in existence prior to the 1999 planning process. They had established priorities and work plans that needed to continue. 3) It also appeared that the program areas had different expectations for use of the county data. Committee co-chairs reported that program leaders were inadequately engaged upfront in the 1999 planning process which may have affected the message teams received. 4) Teams expressed the challenge they had in using data due to the lack of consistent format and priority ranking.  
Recommendation: It may be useful to think about what is realistic to expect of teams relative to the use of county data for program planning.
8. **Planning has multiple benefits.** The primary goal of Extension planning is to find common purpose with communities, businesses and people around the state. However, there are organizational benefits from the statewide planning process that also are considered important; for example, if the process builds esprit de corps; if it brings the Extension office together; if it solidifies Extension as a resource in the community; if it builds partnerships; if it creates visibility for Extension, etc. These are considered important benefits almost regardless of the quality and use of the data that are generated  
Recommendation: Be explicit about the multiple and different purposes and benefits of a statewide planning process. Expect that tradeoffs may be necessary if differing purposes are embraced.

9. **Visibility and partnerships for Extension.** Various respondents spoke about the missed opportunities for using the planning process and resulting data to market and educate about Extension.  
Recommendation: Identify ways in which the planning process and data can be used for optimal impact and in ongoing ways.
  
10. **Program area-specific planning versus county office team planning.** County offices varied in the extent to which they engaged in a total office planning process as opposed to a program area process. The planning committee modeled cross-program area planning and held implicit expectations that counties would plan as a total office unit. However, the need for flexibility and local autonomy prevailed and determined the final process.  
Recommendation: Clarify and consistently deliver the vision for statewide planning and the desired outcomes that are expected with resources available to support the desired change.
  
11. **Time and timing:** All faculty and staff need adequate lead time to prepare for planning. Timing of planning (when it is conducted) is important. Timing may be particularly critical in 2003 given the budget crisis and the potential for scrutiny. According to members of the evaluation team, the budget cycle can start as early as April-May in the southeast, June in the north and continue through November.
  
12. **Involvement of district directors, department heads, specialists.** The importance of strong leadership and a consistent message were reiterated.  
Recommendation: Ensure that all administrators including district directors, unit leaders and campus-based specialists understand the planning process and have the opportunity to participate. The 1999 process of specialist listening sessions appeared to be successful and may be one approach to consider.

## Appendix A

### **Evaluation of UWEX-Cooperative Extension Statewide Program Planning 2002**

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This evaluation is designed to assess the effectiveness of the UWEX-Cooperative Extension program planning procedures and program teams. It will concentrate on the 1999 planning process and will review documents and procedures from the 1995 process as appropriate and available. Strengths and weaknesses of the planning process will be examined in order to determine what worked and what didn't work. Information from this evaluation will be used by the Associate Dean and the 2003 Program Planning Committee to determine how to structure and implement the 2003 planning process.

An "effective" program planning process is defined as

- (1) a process that generates credible data
- (2) use of the generated data by program teams for program planning and implementation
- (3) a process that involves a broad-base of stakeholders (users and non-users)
- (4) a process that builds partnerships (new and/or maintains/builds existing partnerships)
- (5) a process that creates visibility for UW-Extension.
- (6) a process that helps UW-Extension identify priorities and determine resource allocations
- (7) a process that identifies the unique contribution that extension can make versus other providers

The evaluation study will address the following:

1. Procedures used in 1999 to facilitate planning (need full listing of everything that was part of the process)
  - Materials developed last time: what was used; in what way?
  - Training provided: strengths/weaknesses?
  - State Committee process
  - Other resources...
  - Suggestions
2. Local planning process
  - What processes were used by counties? What seems to work/not work?
  - What planning resources used vs. created own? Usefulness of specific tools?
  - Who was involved? Are we engaging/reaching who we need/want to?
  - Is planning producing useful information? Why/why not?
  - Is the information produced used in program development? Why/why not? (see #3)

- How were data handled/compiled and shared?
  - Other benefits/costs of planning process? E.g., new/expanded partnerships, etc.
  - How can data from every county be used when there is great variation in way data are collected?
  - How were local priorities transmitted to...?
3. Use of information/data generated through program planning:
- Did teams/centers use the data – how?
  - Did county staffs use planning data – how?
  - How did the planning data affect team/center formation, development, modification, or termination: Were new teams/centers formed? Were some unsettled? Did the course of any teams/centers change? Did the planning data make any difference to existing teams/centers functioned?
  - Other benefits/possibilities for use of local planning data?
4. Teams/centers
- Are teams/centers functioning as program development teams; building responsive programs based on planning data? Why? – why not? Characteristics of teams/centers where this is happening.
  - What is difference across program areas in the way teams/centers function?
5. Fit between planning data and county program
- Does work of teams/centers fit county programming?
  - Does local county programming respond to local needs that were identified? How often – to what extent is county programming based on localized needs/priorities?
6. Visibility – partnering
- How did planning process create visibility for UW-Extension?
  - Is there any on-going interaction with advisors/stakeholders and/or feedback or continuing communications?
  - How did planning process result in the identification of new audiences; result in working with new partnerships?
7. Externalities
- Given uncertainties of state budget, how to plan based on uncertain budget scenarios?
  - How can we alter plan if need to? Is there flexibility to do so?
  - What external factors influenced the process? Example, legislative dictates influenced emphasis on land use planning.

Evaluation design:

- Document review: 2000 planning process plus assessments and communiques that were filed at the time. Documents/procedures from 1995 process as appropriate and available.
- Interviews and brief surveys with planning committee members, extension leaders, sample of faculty and staff, workgroup team leaders and members.
- Critical case analysis: examples of counties and teams where planning data are effectively used in program development to explore what contributes to this happening. (should we include a few examples of counties and teams where this is not the case?)

Evaluation team:

1-2 members per program area as recommended by Program Leader.  
Ellen Taylor-Powell, evaluation specialist, chair

Expectation of team members:

Steps in evaluation	Expectations
1. Focus the study	Review evaluation purpose, focus and study design Participate in refinement of study design: identification and selection of documentation; identification and selection of respondents; identification and selection of counties/teams.
2. Data collection	Assist with development of questionnaires, interview protocols and case study protocols Conduct interviews and case studies as available
3. Data analysis and interpretation	Assist with analysis and interpretation of all data; review drafts of reports; help with report writing as appropriate
4. Use of findings	Help to ensure that findings are accurately and effectively communicated to Associate Dean, Program Planning Committee and other stakeholders as appropriate Communicate major findings to UWEX faculty and staff

Timeline: completion by early October

Team: Ed Jesse, AG  
Donna Menart, 4-HYD  
Paul Ohlrogge, CNRED  
Peggy Olive, FL  
Tom Parslow, AG  
Denise Retzleff, 4-HYD  
Beverly Stencil, CNRED  
Nancy Stoutenborough, FL  
Ellen Taylor-Powell, Chair

## Appendix B

Program Planning Evaluation: EMAIL QUESTIONNAIRE

TO: UW-Extension DEPARTMENT HEADS

As you know, every 4 years, UW-Extension engages in a comprehensive, statewide planning process. As we begin the next process that will commence in 2003, we want to learn from the 1999 statewide planning process. Ellen Fitzsimmons, Associate Dean and Director, has charged our committee to examine the strengths and weaknesses of past planning efforts to help structure the next planning cycle. This questionnaire is part of our information collection process. Because planning goes on at the county level, your input is vital.

Please find a time to discuss this questionnaire with members of your county office who were involved in the 1999 planning process and solicit their input. 1999 planning materials were provided to each county office in a 3 ring binder, titled Program Planning 2000-04. Please locate these materials in your county office or go to the web site where they are housed (<http://www.uwex.edu.ces.pdande/planning>) to remember what they are and how they were used.

This is your chance to report what worked well and what didn't about the last planning process and have a say in what we do next time. Please use the following questionnaire to report your GROUP response. Return your completed questionnaire by email or mail your hard copy response **BY FRIDAY, OCTOBER 18, 2002** to

Ellen Taylor-Powell at [ellen.taylor-powell@ces.uwex.edu](mailto:ellen.taylor-powell@ces.uwex.edu) or,  
432 N. Lake Street, Room 609, Madison, WI 53706

Please contact any member of the committee if you have questions: Ed Jesse, Donna Menart, Paul Ohlrogge, Peggy Olive, Tom Parslow, Denise Retzleff, Beverly Stencel, Nancy Stoutenborough, Ellen Taylor-Powell (chair).

The full evaluation proposal that describes the committee's work is available on the web at: <http://www.uwex.edu/ces/pdande/planning/>

### **PROGRAM PLANNING QUESTIONNAIRE**

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1. How many of your current county faculty and staff were involved in the 1999 statewide planning effort? \_\_\_\_\_ (total number excluding support staff that were involved in either this county or another county)
2. Of that number, how many are providing input into this questionnaire: \_\_\_\_\_ (total number)

SECTION 1: MATERIALS

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3. Please answer the following questions about the planning materials that were provided in the 3 ring binder titled, Program Planning 2000-2004:

Materials:	Did your office use? (check one)	If YES, how helpful were they? (check one)	Do you continue to use ?
1. Guidelines for Program Priority Setting 2000-2004 (yellow cover) that consisted of:			
a) Planning matrix for identifying diversity	<input type="checkbox"/> Can't remember <input type="checkbox"/> NO <input type="checkbox"/> YES (	<input type="checkbox"/> Very helpful <input type="checkbox"/> Somewhat helpful <input type="checkbox"/> Not helpful	<input type="checkbox"/> NO <input type="checkbox"/> YES
b) Asset mapping tools	<input type="checkbox"/> Can't remember <input type="checkbox"/> NO <input type="checkbox"/> YES (	<input type="checkbox"/> Very helpful <input type="checkbox"/> Somewhat helpful <input type="checkbox"/> Not helpful	<input type="checkbox"/> NO <input type="checkbox"/> YES
c) Key data components	<input type="checkbox"/> Can't remember <input type="checkbox"/> NO <input type="checkbox"/> YES (	<input type="checkbox"/> Very helpful <input type="checkbox"/> Somewhat helpful <input type="checkbox"/> Not helpful	<input type="checkbox"/> NO <input type="checkbox"/> YES
d) Case examples	<input type="checkbox"/> Can't remember <input type="checkbox"/> NO <input type="checkbox"/> YES (	<input type="checkbox"/> Very helpful <input type="checkbox"/> Somewhat helpful <input type="checkbox"/> Not helpful	<input type="checkbox"/> NO <input type="checkbox"/> YES
e) Tools	<input type="checkbox"/> Can't remember <input type="checkbox"/> NO <input type="checkbox"/> YES (	<input type="checkbox"/> Very helpful <input type="checkbox"/> Somewhat helpful <input type="checkbox"/> Not helpful	<input type="checkbox"/> NO <input type="checkbox"/> YES
f) Sample news stories	<input type="checkbox"/> Can't remember <input type="checkbox"/> NO <input type="checkbox"/> YES (	<input type="checkbox"/> Very helpful <input type="checkbox"/> Somewhat helpful <input type="checkbox"/> Not helpful	<input type="checkbox"/> NO <input type="checkbox"/> YES
2. 1999 Trends Analysis (red cover)	<input type="checkbox"/> Can't remember <input type="checkbox"/> NO <input type="checkbox"/> YES (	<input type="checkbox"/> Very helpful <input type="checkbox"/> Somewhat helpful <input type="checkbox"/> Not helpful	<input type="checkbox"/> NO <input type="checkbox"/> YES
3. Video	<input type="checkbox"/> Can't remember <input type="checkbox"/> NO <input type="checkbox"/> YES (	<input type="checkbox"/> Very helpful <input type="checkbox"/> Somewhat helpful <input type="checkbox"/> Not helpful	<input type="checkbox"/> NO <input type="checkbox"/> YES

SECTION 2: LOCAL PLANNING PROCESS

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4. What suggestions do you have for materials that would be helpful in the next planning process?

5. Were the priorities that your county identified reflected in the statewide teams/centers within each program area?

Program Area	Extent to which the county priorities were reflected in the state teams/centers (check one)
Agriculture	<input type="checkbox"/> A great deal <input type="checkbox"/> Somewhat <input type="checkbox"/> Not much <input type="checkbox"/> Not at all <input type="checkbox"/> Don't know – can't answer
Family Living	<input type="checkbox"/> A great deal <input type="checkbox"/> Somewhat <input type="checkbox"/> Not much <input type="checkbox"/> Not at all <input type="checkbox"/> Don't know – can't answer
4-H Youth Development	<input type="checkbox"/> A great deal <input type="checkbox"/> Somewhat <input type="checkbox"/> Not much <input type="checkbox"/> Not at all <input type="checkbox"/> Don't know – can't answer
Community, Economic, Resource Development	<input type="checkbox"/> A great deal <input type="checkbox"/> Somewhat <input type="checkbox"/> Not much <input type="checkbox"/> Not at all <input type="checkbox"/> Don't know – can't answer

6. What worked well with the planning process your county used in 1999?

7. What didn't work so well? Describe any problems your county experienced.
8. In the 1999 planning process, did your county do as well as you'd like in reaching and engaging:
- a) the diversity of your county?  
YES  
NO
  - b) users and non-users of Extension?  
YES  
NO
  - c) If you answered NO to either 8. a) or 6. b) above, please indicate what you could/would do differently to ensure that the planning process reaches and engages diversity and users/non-users.
9. What suggestions do you have so that the statewide planning process can allow variation for localized county planning, but still collect data that can be used for setting state priorities?

### SECTION 3: USE OF PLANNING DATA

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10. Did you use the county planning data for other purposes than to send to the state level?
- a) YES
  - b) NO
11. If yes, what else did you do with the data? (check all that apply)
- a) Shared with other agencies/partners
  - b) Used to develop local programs
  - c) Used in tenure documentation
  - d) Used in grant writing
  - e) Other: please explain

12. Was there any additional information that you wished you had collected?

- a) YES
- b) NO

c) If YES, what information do you wish you'd collected?

13. How did your office deal with local needs that did not result in a state response?

#### SECTION 4: BENEFITS AND VISIBILITY

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14. Did the 1999 planning process help you to identify new audiences?

- a) YES
- b) NO

If YES, Please list new audiences identified:

15. Did the 1999 planning process help you identify new partners?

- a) YES
- b) NO

If YES, please list new partners identified:

16. Did the 1999 planning process help you to refocus or change programming?

- a) YES
- b) NO

If YES, how? – what changed?

17. To what extent did the 1999 planning process help your county office gain media attention?

- a) A great deal
- b) Somewhat
- c) Not much
- d) Not at all

18. To what extent did the 1999 planning process help your county office gain visibility for existing programs?

- a) A great deal
- b) Somewhat
- c) Not much
- d) Not at all

19. To what extent did the 1999 planning process help identify the unique contribution that Extension can make versus other providers?

- a) A great deal
- b) Somewhat
- c) Not much
- d) Not at all

20. Were there any other benefits as a result of the 1999 planning process?

- a) YES
- b) NO

If YES, please explain

21. Were there any negative consequences as a result of the 1999 planning process?

- a) YES
- b) NO

If YES, please explain:

## SECTION 5

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22. To what extent do you think the 1999 planning process generated credible data that was useful in program planning? Please add any comments you'd care to share.

- a) A great deal
- b) Somewhat
- c) Not much
- d) Not at all

23. To what extent do you think county stakeholders viewed the Extension planning process as generating credible program planning data? Please add any comments you'd care to share.
- a) A great deal
  - b) Somewhat
  - c) Not much
  - d) Not at all
24. What other factors, besides local planning data, affected your county program priority setting in 1999 (e.g., legislator's emphasis on land use, natural disasters/emergencies, existing programs, etc.)

We may need and want more in-depth information regarding the 1999 planning process. Please include your name if you'd be willing to discuss (via teleconference group discussion) your county planning process and/or recommendations for the upcoming process in more detail.

Name: \_\_\_\_\_  
Email: \_\_\_\_\_

## **PROGRAM PLANNING EVALUATION: Statewide Program Teams**

As you know, every 4 years, UW-Extension engages in a comprehensive, statewide planning process. As we begin the next process that will commence in 2003, we want to learn from the 1999 statewide planning process. Ellen Fitzsimmons, Associate Dean and Director, has charged our committee to examine the strengths and weaknesses of past planning efforts to help structure the next planning cycle. This questionnaire is part of our information collection process.

Please discuss these questions with other members of your statewide program team or members of your work groups as appropriate. This is your chance to report what worked well and what didn't about the last planning process and have a say in what we do next time. Please return one completed questionnaire per team by email or mail your hard copy response **BY FRIDAY, October 25, 2002** to

Ellen Taylor-Powell at [ellen.taylor-powell@ces.uwex.edu](mailto:ellen.taylor-powell@ces.uwex.edu) or,  
432 N. Lake Street, Room 609, Madison, WI 53706

Please contact any member of the committee if you have questions: Ed Jesse, Donna Menart, Paul Ohlrogge, Peggy Olive, Tom Parslow, Denise Retzleff, Beverly Stencel, Nancy Stoutenborough, Ellen Taylor-Powell (chair).

The full evaluation proposal that describes the committee's work is available on the web at: <http://www.uwex.edu/ces/pdande/>

## **PROGRAM PLANNING QUESTIONNAIRE – Statewide Teams**

25. Name of team \_\_\_\_\_

26. Program area \_\_\_\_\_

27. Number of individuals providing input into this questionnaire \_\_\_\_\_

28. Was your team/center (check one)

formed as a result of priorities set from the 1999 program planning?

an existing team at the time of 1999 program planning?

If it was an existing team, did the 1999 planning data cause any changes, redirection or refocusing of your team/center?

YES

NO

If yes, please explain briefly.

29. How did your team use the data from the county planning process in 1999?  
(check all that apply)
- we really didn't use it much
  - the data were summarized centrally and provided to the team
  - team members individually looked at the county planning data
  - we discussed the county planning data as a team
  - we really tried to build the team's work on the county data
  - other: please briefly describe
30. To what extent did the county planning data help determine your team's priorities? (check one)
- A great deal
  - Somewhat
  - Not much
  - Not at all
31. What was useful about the data? (check all that apply)
- Identified common concerns across counties
  - Stimulated discussion
  - Helped to identify priorities
  - Helped to generate media coverage/publicity for our team/center
  - Helped identify resources needed
  - Affirmed ongoing programming efforts
  - Helped identify new partners
  - Helped identify new audiences
  - Helped to refocus our team/center
  - Other:
32. What would have made the data more useful to your team?
33. Was there information that you wish you'd had in order to set team priorities and develop programs?
34. Besides the local planning data, what other information/input did (does) your team use in program development (e.g., specialist input, existing curriculum, requests of external partners)?

35. What were some other positive outcomes of the 1999 program planning process?  
(check all that apply)
- a) New people joined the team/center
  - b) Workgroups formed around issues as identified by the data
  - c) Team/workgroup involvement was stimulated
  - d) Teams/workgroups helped streamline the data that helped counties focus on priority issues
  - e) New teams/centers formed
  - f) New workgroups formed
  - g) Other: Please list
36. What didn't work so well? What improvements would you suggest?
37. To what extent do you think the 1999 planning process generated credible data that was useful in statewide planning? Please add any comments you'd care to share.
- a) A great deal
  - b) Somewhat
  - c) Not much
  - d) Not at all
38. What other factors, besides local planning data, affected your team/center program priority setting in 1999 (e.g., legislator's emphasis on land use, natural disasters/emergencies, existing programs, etc.) ?
39. What suggestions do you have so that the statewide planning process can allow variation for localized county planning, but still collect credible data that can be used by teams for setting priorities and program development?

Please provide any additional comments you have.

## Appendix C

### Department Head and Team Response

<b>Department Heads</b>			
<b>County</b>	<b>Name</b>	<b>County</b>	<b>Name</b>
Ashland	Jane M. Silberstein	Manitowoc	Scott R. Hendrickson
Bayfield	Kathryn Miller	Marathon	Michael R. Wildeck
Calumet	Matthew J. Glewen	Marinette	Scott A. Reuss
Chippewa	Randy L. Knapp	Marquette	Keith Vander Velde
Clark	Mary Ellen Sjolin	Menominee	Donna K. Hora-Schwobe
Columbia	Laura Paine	Monroe	Karen L. Joos
Dane	Lee Cunningham	Oneida	Linda A. Boelter
Dodge	David L. Neuendorf	Outagamie	Karen M. Dickrell
Door	Karen Krause Hintz	Pepin	Robert K. Cropp
Dunn	Lana P. Anderson	Portage	Mark K. Hilliker
Eau Claire	Mahlon J. Peterson	Racine	Bonita S. Herrmann
Florence	Joan E. (JP) Ploetz	Richland	Pamela J. Hobson
Fond du Lac	Nan A. Baumgartner	Sawyer	David A. Berard
Forest	John Harter	Shawano	Joseph J. Stellato
Grant	David L. Wachter	St. Croix	James D. Janke
Green	Mark W. Mayer	Taylor	Dante Renzoni
Green Lake	Michelle D. Tidemann	Trempealeau	Jonathan Zander
Iowa	Ruth N. Schriefer	Vernon	Karen Ehle-Traastad
Jackson	Deborah A. Jones	Walworth	Shelby J. Maier
Jefferson	Mary L. Gruenewald	Washburn	Beverly Stencel
Juneau	Craig A. Saxe	Washington	Dan A. Wilson
Kenosha	Tedi J. Winnett	Waupaca	Connie D. Abert
Kewaunee	Mary D. Novak	Waushara	Sheila R. Koca
Lafayette	Betty J. Gleason	Winnebago	Christine Kniep
Langlade	Kenneth R. Williams	Wood	Peter D. Manley
Lincoln	Thomas K. Cadwallader		

<b>STATEWIDE PROGRAMMING TEAMS, 2000-2004</b>		
<b>Program Area</b>	<b>Team Name</b>	<b>Contacts</b>
Ag and Natural Resources	Beef Focus	Jeff Lehmkuhler; Scott Hendrickson; Tom Parslow
Ag and Natural Resources	Swine Team	Dan Short; Tom Parslow
Ag and Natural Resources	Team Forage	Mike Rankin; Dan Undersander; Tom Parslow
Ag and Natural Resources	Team Grains	Dick Wolkowski ; Greg Andrews; Tom Parslow
Ag and Natural Resources	Urban Ag/Horticulture Team	Bob Tomesh ; Patty Nagai ; Lee Cunningham
Ag and Natural Resources	Farm Management Education	Gregg Hadley ; Jenny Vanderlin; Cheryl Skjolaas; Lee Cunningham
Ag and Natural Resources	Food Industry Research, Service and Training (Wisconsin FIRST)	Steve Ingham; Tom Parslow
Ag and Natural Resources	Land Use and Agriculture	Bill Bland ; Tom Cadwallader ; Lee Cunningham
Ag and Natural Resources	Nutrient Management	Larry Bundy; Fred Madison; Ron Wiederholt; Matt Hanson; Tom Parslow
4-H Youth Development	Youth in Public Leadership	Marie Lee; Linda Kustka
4-H Youth Development	Strengthening 4-H Project Support	Jeanne Baum ; Melanie Miller
4-H Youth Development	Building Capacity Communities for Youth Development	Sue Pleskac; Shep Zedin
4-H Youth Development	Relating to Others in a Changing Society	Pam Hobson
Family Living Programs	Food, Nutrition and Optimal Health	Susan Nitzke; Nancy Coffey
Family Living Programs	Strengthening Individuals, Families, and Communities	Steve Small; Beverlee Baker
Family Living Programs	Family Economic Security	Judi Bartfeld; Mary Fran Lepasca
CNRED	Locally Driven Community Development	Al Anderson
CNRED	Local Government and Finance	Charles Law
CNRED	Basin Initiative	Robin Shepard

## Appendix D

### Suggestions for materials that would be helpful in next planning cycle

- Materials similar to those provided in 1999, especially the case examples
- Description of ways to obtain data; trends, statistics and demographic information in general is very useful; matrix showing potential audiences is useful.
- Up to date census data in a usable format. Exchange questions.
- Trend data and analysis; Material on situational analysis; Make data available so staff does not have to spend a lot of time searching for it.
- Broader breadth of materials. In the past, not enough emphasis placed on rural issues.
- Customized GIS program for each county to use to map our county's success stories. (e.g. base map would be county supervisory district with overlay of outreach and clients located in each district, based on our mailing lists and program attendance).
- Demographics by county and municipalities within county. State wide Economic Summit Summary. Define the role of Extension in the statewide Engaged University movement.
- Summary of economic and demographic trends
- It is helpful to have a variety of tools to choose from. Materials that help us customize trends to our county (i.e. insert county Census data or other sources of County data).
- Need materials earlier so have more lead time. Key data components, case examples, trends analysis. Need to stick to things we can provide--can't come up with lower cost health care insurance.
- Updated trends information; options for gathering input; no need for video
- County Demographics (Agriculture)
- Implement strategic planning model that is being used by UWEX.
- The materials developed need to be able to have counties "plug" the data into them. Need to be focused and issue driven. Need to have a resource listing of places where data that is specific to your program area can be retrieved. Have this listed for all program areas, as there may be some overlapping.
- Materials in yellow booklet were most useful. Trend statements from specialists not useful. We would appreciate census information or references to relevant census data in the next planning process.
- The 1999 materials were very helpful. Materials that continue to show creative processes for conducting the process and allow county flexibility without huge demands on time.
- Trends analysis that are statewide but also broken down to county level; list resources that are available to us and contacts; leave final decision to us.
- Pieces that are easily "adapted" for local use.
- Outside people & determine what the collective data means.

- A variety of options for gathering information. Every county is at a different stage.
- Allow for county differences/needs/etc
- Either a lot of direction, or none. This sounds unusual, but counties either need to be able to do whatever works for them, or they need to have very significant direction and all use a standardized protocol. Having something in-between leads to discomfort with the proposed system and inadequate results.
- Not much has changed and I think you should stick with the same ones. Good programs should last more than 4 years.
- Trends data
- Haven't seen the last stuff. An idea of statewide UWEX goals or directions. Information and statistics describing urban vs. rural populations
- Most effective is working with local people here working with county stakeholders.
- Keep the procedures flexible to fit the climate and environment of each county and the talents and abilities of staff facilitation skill sets.
- Demographic information - Local; Key data Components - By program area; Example survey processes.
- Clear expectations, web based materials, keep it simple, offer concrete examples & variety of ways to conduct needs assessment, scope of what gets assessed and what is within our mission (how to transfer other issues to who/where), address civil rights compliance & examples of needs assessment & mark?? to understand audience.
- Additional cases examples, mock program plans, tools collection.
- The materials were generally helpful, but often we have better, more current materials within our own office. I used the tools for programming afterward and they were excellent
- Drop this 4-Year planning requirement. Things change so much from year to year that your plan is obsolete way before you get to your 3rd year, especially in agriculture programs! A 2-year plan would be plenty long enough.
- Same types of materials as provided in 1999 with appropriate updates.
- A visit to our office by a planning committee member with follow up meetings by phone and in person.
- Websites with relevant information (a crib sheet on how/where to access relevant web sites. Don't spend money on publishing data.
- Keep the variety of methods described in the last materials so we can choose a different method if we wish. Sample letters, etc. are useful for quick adaptation.
- Recent census data
- Trends analysis localized but broader coverage of trends was needed.
- Materials should be more bulleted or concise. .Need more time to pull together the results – seemed to be rushed at the end of the process to get report in.

## Appendix E

### What worked well with the planning process used in 1999?

- Using existing assessments and dual scan approaches worked well.
- The survey was an efficient use of obtaining information in a reasonable amount of time.
- It was easy. Broad layout
- Key informant process. Led to program areas meeting. Extension leaders and other community leaders outside of their respective program areas.
- Bringing together all ages of people and diverse levels of education
- 1: Ice Cream; 2: Coordination of efforts between staff (off site staff were also involved). 3: Were able to draw a variety of people together—and give an overall picture of Extension programs to focus group participants.; 4: Each group worked well together during the session and developed a consensus of issues impacting the county.
- The flexibility of the process to be used in each county.
- We tried to integrate the planning process into our ongoing programming and issue identification efforts. This was less disruptive in terms of needing to stop and do something completely different for awhile. Also, there was concern about the credibility of relying on a one-time group of advisors who would provide input based on a limited amount of information and interaction.
- Utilizing existing needs assessments that had been done (i.e. United Way's Compass Report). Generally our staff is already involved in a partnership where strategic planning and needs assessments have been done. Using key informants to help identify trends, issues and programming needs.
- Involved oversight committee in selecting Key informants. Used input from key clientele groups.
- People enjoy being asked to participate, were enthusiastic and involved.
- maintaining individual program areas-not lumping us together, plenty of time to collect material, trend data sheets- could use more
- Survey; Focus Group(AG only)
- Local county process/ was completed in one meeting.
- Our county used a modified Delphi assessment to assist in the planning. Also having the demographics by county and individual towns, villages were helpful as well.
- Everyone was committed to the process so the workload was evenly distributed. We each felt we had an important stake in the outcomes. We had a relatively new staff so it was a timely opportunity for all of us to tune into the needs of our audiences. The phone call and focus group approaches let us reach a wide diversity in our county – ages, interests, gender, and employment.
- The key informant process worked very well. We received good data, had a high response rate, and the time investment required by staff was reasonable.

- We were able to draw on assessments done by a variety of groups we work with rather than forming another program planning advisory committee; our core committee for the process was the University Extension Education committee; they identified priorities and then grouped them into tiers rather than rank order.
- Networking; office worked and developed this process as a team; Results were meaningless for 4-H Youth Development
- Getting individuals involved in a group process; we divided into teams to show the cross-programming in our office
- We utilized the key informant approach to get specific information from both users and non-users of Extension. Everyone felt comfortable with the process.
- Input was good.
- Because each program area had just completed different community issue identification processes, we put the findings together, saw where we were missing some parts of the community and did additional survey and focus groups. This worked good for us because it avoided duplication.
- Focused thinking
- Didn't use the UWEX materials to any great extent because: Marathon county UWEX used the county wide process "Envision Marathon County" that identified assets and issues to work on by establishing 20 goals (see report) which were used by UWEX. 3 UWEX faculty numbers were involved in focus groups and various community processes to obtain broad based resident input in Envision marathon County Process; UWEX office assessed to use new & existing Envision data.
- The multiple meeting process that we followed allowed many citizens to have input in the process and achieve a good cross-section of our citizenry. The time in-between the multi-phase meetings allowed thought and analysis which seemed to allow a very thorough process that really did reflect the actual needs of our county's residents.
- Procedure was ok
- Focus groups, organizational information
- Planning your own questions.
- Evening community meeting. Team meetings
- Surveys with key informants; used existing United Way. Community foundation needs assessment; Worked with DHHS (Department of Health and Human Resources).
- We had options of how to complete the planning.
- Sampling method was excellent - we used a phone survey with 300 completed calls - was easy to analyze issues.
- Flexibility in process used, ended up with top 20 list of issues.
- Brought all types of people into a meeting together rather than each program area doing it separately; Finding out what each program areas was doing to collect info, having deadlines to come together to assess data as an office.
- We used existing studies and then held focus groups to reaffirm the results
- Can't recall that far back

- Use of random sample survey worked well to reach a broad segment of the county population and to obtain results that weren't prejudiced by trends presentations as in 1991. This method was also economical and time efficient.
- We just worked alone- seat out Delphi surveys and continued to do business as usual because the survey supported it.
- We tried to get as much use as possible out of the data. If we had already collected information we didn't try to recapture it through additional survey, etc.
- The modified Delphi survey worked well for this county. We feel we received more input from people with the mailed questionnaires than we would have from numbers who would have attended a meeting. Using that data along with advisory committees and key informant input gave a very good picture of needs in our county.
- I liked the flexibility of utilizing existing coalitions and groups to gather information.
- Flexibility of planning tools allowed. 2. Letting us use data already gathered by ourselves or others for other planning purposes so we didn't have to re-do the studies and re-contact people, wasting their time and ours.
- Strengthened our position politically with county board, Key informants, education & Culture Committee, and the rest of the county Board were in synch on main issues
- Worked together to get list of who to invite; while office involved; issue identification was right on; matrix for university was a plus; important for state to provide data, case examples, news stories and trends; Ag Nominal Group
- Confirmed current focus and efforts.
- Staff working together on the planning

## Appendix F

### What didn't work so well?

- Did not experience any problems
- We were not sure that our sample was a representative one
- Missed some geographic areas.
- The amount of time required to do it right. Agents need to block out sufficient time. The results at the county level in the county partners see only planning - no product produced; lack of understanding by state specialists and administrative people about the different approaches and tools suggested for use in the program planning process.
- We struggled with getting non-Extension users involved. Our job is to work with people that want help or information. If they don't want help or information, it is hard to get them convinced of the value we can offer them.
- We didn't get as much participation as we'd like to have. We probably only got half the people we invited to attend. We did end up with about 20 at each of 3 sessions, however.
- The length of time it took to get all the information into a useful end product.
- Although we tried to track issues and audiences beyond our existing programs and clientele, one could argue that our process had "blind spots."
- Our Advisory Committee didn't really work very well. We involved our extension oversight committee in using the planning matrix to identify Advisory Committee members. However, we ended up with a member of rather radical people, and it was difficult to summarize discussion and get a good sense of direction from the group. We did a lot of information on trends, issues and concerns in Door County and ended up putting many individual suggestions in rather than a more prioritized listing! We also had trouble getting good meeting attendance from the Advisory Committee members.
- Time consuming. Didn't have enough focus on needs of limited resource
- Poor response rate
- Getting people to attend focus group meeting.
- In using the Delphi method, we had to remind people to send back their responses. So it was more time intensive to gather the information.
- Motivating the 100 respondents to our phone survey to attend the face-to-face meeting to help us sift through & prioritize our plans.
- No problems encountered.
- We kept the process simple and it worked well; one colleague felt more structure is needed at the state level when developing teams and more assistance is needed in setting course of action and expectations.
- Hard to reach everyone; Same people came that are involved in other extension programs; Highly bias small sample can result in a highly bias response

- We can't always get a perfect representation of the county to participate. It's difficult to ask them to take time for "our" process – it needs to be of value to them.
- Timing. It was difficult to conduct the process in summer and early fall.
- Many stakeholders did not provide inputs. How do we objectively evaluate the data we get?
- What we did worked well
- All materials not used due to Extension Process.
- The only real problem with the open meeting process we employed is that some people were there for only one key reason and did not want to participate fully in the entire process.
- We get involved in local needs.
- Some of the responses were not specific enough. We asked more general questions about the county and not enough specific ones about Extension programs and future directions.
- Across program plans never materialized.
- Listening sessions-very low attendance; needed bigger, broader groups; Need participants that have a greater knowledge of Extension and issues in the county.
- Cannot think of anything that did not work.
- Cost - personnel time to complete the process in addition to current work load.
- Very time consuming to take 1st survey of modified Delphi to condense for second survey. Outcome - priorities that we cant address based on our purpose, mission, funding.
- Collecting final priorities through a combined program entire office group; priorities became so watered down they weren't helpful for program planning.
- Getting all the program areas engaged. It also seems that the CNRED program area built the issues around existing centers, which maybe didn't refocus as much as was needed
- Do not recall any particular problems that stand out.
- No problems that we can recall
- Too much info that has little use - poor return of survey.
- We all hated each other then
- Compiling the data from the first questionnaire for the second was a daunting task because we received so many responses on the first one. What a nice problem to have! But it did take a lot of time to sort out for the second questionnaire. Answers were hard to quantify from the first survey because wording varied so much. It was easier with the second survey.
- Without the "requirement" of having to conduct a formal program planning process, we did not invest the amount of time that we had in the past. In the end, the process wasn't taken very seriously. Some faculty members put in more time than others.
- Trends analysis left a number of blanks/missing issue areas
- The process is so involved it is daunting in terms of time and energy.
- Timeline – while we knew it was coming it seemed like an “add on” so it wasn't fully developed

## Appendix G

### What you would/could do differently to reach and engage diverse and non-Extension users.

- Random sampling of users/ non-users; needed more focus on native American population.
- Include large urban audiences
- We still don't have a sure fire idea of how to get non-users involved. One way would be to use a phone needs assessment tool rather than face-to-face.
- Use the matrix more effectively; give people an incentive to participate; find a way to get feedback from people without taking a lot of their time.
- Identify reaching diverse audiences and non-users as priority office wide
- I think that we have more diversity in our county now. I think that we might need to do one-on-one visits to get better input and involvement.
- Survey more diverse populations-better awareness of changing demographics
- The planning process needs to involve more total numbers of people and not just a few hand-picked representatives.
- Target specific communities more.
- Very difficult to survey "non-users". Would like assistance with strategies for this in the future.
- Working through school personnel as well as direct contacts with the Ho-Chunk nation. We may be able to identify "non-users" through local community organizations.
- We need to spend time that we don't have to develop the process.
- A random people survey of all residents could provide information, but how do we finance?
- I'm not sure how to answer this, as our experience was that only those people at least somewhat familiar with UW-Extension services were interested in giving guidance in any way, shape, or form. We did specifically invite many persons not involved in UWEX programming, but they chose to not be involved.
- Hard to answer, it seems harder to get people to attend sessions
- Start earlier; we were looking for what did work from other counties. Contact counties where it works- share with others.
- Since 1999, our staff has completed a civil rights review that helped all of us step back and evaluate the diverse population of the county. While Pepin County has little ethnic diversity at face value, we do have unique economic, gender and religious diversity. We believe that we improved efforts to reach more of these people.
- Identified, but return was less from diverse and non-users of Extension. Instead of asking for a survey to be completed, do key informant interviews for a more personalized approach. Have also in Spanish.

- Invited diverse audience but not all attended; press release or something to invite non-users Risk: may get whole different audience than you anticipate; more critically identify non-users; non-users was not as strongly recruited.
- Spend more time up front addressing these issues
- Seek some more diverse individuals to provide input

## Appendix H

### What would have made the data more useful to your team?

To this open-ended question, teams provided the following comments:

- Categorizing the data by common elements. We really had hoped that those counties with the priorities identified would join our team. It made us wonder if this really was a programming priority or if there were barriers to joining a work team that we weren't aware of; one thought was how the data may have come to us, but we are really unsure about this.
- Team deals with specific crop commodity – most trends are known.
- The county summaries were sufficient to work into the HortTeam planning system which has been in place for several years. In the past the team relied on counties supplying HortTeam membership. The county summaries provided for greater statewide input into the HortTeam planning process.
- A more specific problem was the abundance of data that we had and the issue/decisions that went into prioritizing issues of relevance to both the state and county level.
- Some issues were specific, while others were molded into one broad issue. The data collected by counties was usually very general with little context to gain understanding of the issues and the kind of resources needed. It was hard to compile the data with different methods of collection and formats of how issues were reported to the state.
- If we had used it. At the onset of team management there were a lot of Farm Management issues to address. Our team never really viewed the data to see if it was/would be useful.
- As I recall, the data were provided as basically long lists of responses. To be useful for teams, would have been much more helpful had these been carefully processes/organized. It was difficult to gauge what really were important and recurring themes-especially in combination with the fact that each county gathered their info so differently. It really needed more advance work by someone to make the team planning more useful.

## Appendix I

### What didn't work so well? What improvements would you suggest (question 12 from team survey)

- Recruiting and retaining team membership (4-HYD particularly spoke about team membership issues).
- Need for stronger specialist support.
- Summarization of county data – know what county data comes from.
- Inclination is to want to capture all needs into a POW – need to prioritize and simplify to major top priorities. Then the problem arises when some agents/specialists don't have an area to report to. Difficulty for untenured agents when teamwork overshadows recognition of individual contributions
- Swine is often not a high priority – limited interest statewide - so team is very small.
- Face to face communications are vital to team success but opportunities are rare.
- Team system in CNRED didn't work.
- Planning process may be a waste of time for what we got out of it
- Team ended up being so broad that team wasn't as effective in coordinating efforts. May need to rethink how we structure different levels of resources provided as teams: One level might be having web-based resources that simply get downloaded and used locally. Another level could be a team working on a concrete project such as a gap in resources/curriculum. Need to address the number of partners county and staff work with outside of UWEX.
- How to get more general “buy in” from extension staff statewide to focus on a few high-priority issues for the institution or at least the program area?
- It is great to have local and statewide data but important that it not be too general. We try to do too much and dilute our efforts. Seemed unrealistic to try for level of detail that we did in the plans, given that only a small subset of people will be doing the work are involved and given individual discretion about what activities to actually engage in. Perhaps use general planning session to identify broad priorities/emphases, then have separate process for more focused planned. Seemed premature to identify indicators in advance of deciding in detail on what the programming will be.

## Appendix J

### **What suggestions do you have so that the statewide process can allow variation for localized county planning but still collect credible data for use by teams for setting priorities and program development?**

- Concerned by data coming in a variety of forms and in a variety of words that we had to interpret. Our committee was very small and we had a learning curve to overcome in understanding resources, expectations and goals of the work teams. Often we were given inconclusive leadership from administration/program area. Expectations clearly articulated would help provide for faster start and allowed us to spread our wings sooner. Connecting with the planning and reporting system was difficult as it was a structure in place that we had to make our thoughts and objectives work. Somewhere in there was a disconnect that was somewhat frustrating...but we did overcome.
- Have a common process with some uniform questions. These questions can be broad in order to not limit topics. Yet it seems like we need some parameters to not spend much time discussing what is beyond our mission
- Allow membership of teams to prioritize issues and create own plan of work that is flexible and meets needs of clientele of WI
- County needs are very localized, depending on all sorts of readily imagined local situations. County faculty must be responsive to local issues. Statewide planning should perhaps have as its goal facilitating as many local issues as possible, rather than exerting any top-down pressure on county programs. In practice I am sure this is mostly how it works but some articulation might help clarify statewide planning roles.
- Need for personal interaction – no substitute
- Let the centers design their own planning and evaluation process. This other was cumbersome and largely ineffective. Make local data available to teams by regions of the state. More emphasis on regional approach to local government governance.
- Develop possible criteria for selecting data collection process. Summarize pros and cons of each process. Be very specific in expectations of how each county reports data/issues back to the state. Very broad issues lack context, but may be hard to compile. We need to be able to learn about the context behind the issue to gain better understanding of resources needed from a team. Ask for information on current funding streams/contracts/commitments within counties that may force certain issues to be addressed and the University to respond. Review the mission of what UWEX can do, versus trying to do everything.
- If everybody had to contribute to planning and programming of at least one team annually, there would be more comprehensive impact data to report statewide and capture “chunks” of extension’s accomplishments.
- If we could somehow have a two prong approach, where state programming is shared when county data is collected and then that county input used in

looking at the need for continuing existing programming and establishing any new efforts.