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Engaging Stakeholders in Extension Strategic Planning

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Abstract. Strategic planning is the deliberative, disciplined effort to produce decisions and actions that shape and guide what an organization is, what it does, and why. [State] Cooperative Extension invested considerable time and effort in conducting a statewide process to engage internal and external stakeholders and nonusers. The strategic planning steering committee balanced negotiations in defining the process, determining who should be involved, and how to develop goals. The semi-structured interviews with the steering committee members, generated three themes: effectiveness of the team enhanced results; context and process can inhibit stakeholder participation, the steering committee needs a commitment to diverse voices.

INTRODUCTION

Virginia Cooperative Extension invested considerable time and effort in conducting a statewide process to engage internal and external stakeholders and nonusers in a feedback process. The process is relayed in Appendix A. The strategic-planning steering committee—the group observed and analyzed through this research—balanced many negotiations in defining the process, determining who should be involved and how to develop goals. Reflecting on this experience is valuable for other Extension systems when they use strategic planning to guide future performance that ensures that Extension work is relevant to historic and new audiences.

Strategic planning is the deliberative, disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why (Andersen, 2000; Bryson, 2011; McLean, 2018). Therefore, strategic planning is a recognized organizational planning approach for municipal governments (Poster & Streib, 2005), public and nonprofit organizations (Bryson, 2018), and Extension (Donaldson & Hastings, 2020).

Several articles relevant to strategic planning or organizational change initiatives have been published (e.g., Boleman & Cummings, 2005; Bull et al., 2004; Conone, 1991; Fetsch and Bolen, 1989; Fitzsimmons & Campbell, 1992; Johnsrud & Rauschkolb, 1989; King & Boehlje, 2000; McDowell, 2004; Schmitt & Bartholomay, 2009). Four of these publications are more than 3 decades old, having been published in the 1980s and 1990s. Additionally, only Fitzsimmons and Campbell (1992) reported how a state-level Extension system initiated and completed its entirety's strategic-planning process.

Since 2009, when the strategic-planning process outlined in this article was implemented, only two papers have been published addressing Extension's strategic-planning process. Warner et al. (2017) relayed the outcome of an Urban Extension strategic-planning process. Donaldson and Hastings (2020) was an empirical report on a statewide strategic-planning process. It remains unclear who has influenced data-collection design, data analysis, and decision-making processes involved in strategic planning.

LITERATURE REVIEW

Strategic planning was developed in the corporate sector as an alternative to long-range comprehensive or master planning (Bryson, 2017). Fetsch and Bolen (1989) introduced strategic planning to Extension. Strategic planning places emphasis on (a) action; (b) consideration of a broad and diverse set of stakeholders; (c) attention to external opportunities, threats, and internal strengths and weaknesses; and (d) attention to actual or potential competitors (Bryson & Roering, 1987). Public-sector and nonprofit organizations have a critical need to articulate, evaluate, and manage their planning strategies to their constituents, direct stakeholders, and the public at large (Franz & Townson, 2008).

Martin and Rewerts (1988) emphasized the importance of listening to Extension customers in the planning process. Successfully seeking and responding to Extension customer feedback will ensure that the organization stays relevant (Donaldson & Hastings, 2020; Boleman & Cummings, 2005). Conone (1991) highlighted that Extension exists in

its stakeholders' context and that historic stakeholders (e.g., agricultural commodity groups or generational 4-H volunteers) can have an outsized influence on the organization's future. In some cases, historic stakeholders may prevent the organization from adapting to current and future contexts (Elliott-Engel, 2018). Conone (1991) recommended that Extension include people without a vested interest in the existing administrative structure or programming efforts. Nonusers—those who have not received Extension services—are also important to seek input from because they either have not found value in the product or have not been made aware of the services offered.

CONCEPTUAL FRAMEWORK

Planning, whether for educational programs or a strategic plan, is a “social activity whereby people...negotiate personal, organizational, and social interest in contexts marked by socially structured relations of power” (Cervero & Wilson, 2006, p. 24). It is “practically and ethically essential to ask who benefits and in what ways” (Cervero & Wilson, 2006, p. 26).

Negotiations always occur at two levels of meaningful contribution (Cervero & Wilson, 1998). One level is the substantive negotiation, in which people act within complex power relations to design programs. The other level is the meta-negotiation, in which people act to change or maintain power relations (Cervero & Wilson, 1998).

Based on the planning table framework, planners must understand who does and who does not participate in the planning process. Cervero and Wilson (2006) maintained that planning practices occur at “multiple physical and metaphorical planning tables” (p. 18), similar to the variety of stages and steps outlined in strategic-planning theoretical models (Bryson & Roering, 1987; Nutt & Backoff, 1987). The steering committee used the planning table as the conceptual framework for the strategic-planning process.

METHODOLOGY

The purpose of this research was to analyze and reflect on the planning process used to produce a new strategic plan for Virginia Cooperative Extension. The researchers asked the following questions: (a) How does the steering committee influence the planning process? and (b) What was learned by the steering committee to implement a better strategic-planning process? The planning process was concurrently and summatively investigated by using a qualitative descriptive case study approach (Yin, 2017). Members of the research team gathered data on the steering committee's activities as the strategic-planning process was carried out. Data were then analyzed while the strategic-planning work continued.

The interviews were then conducted at the conclusion of the steering committee's activities.

THE CASE

In 2008, as the United States was experiencing the Great Recession, Virginia Cooperative Extension received a \$4.7 million state budget reduction. This loss in revenue caused an organizational reevaluation. Virginia Cooperative Extension opted to develop a strategic plan in the absence of having any organizational plan. The state leadership team chose to create a 5-year strategic plan by using a research-based methodology to inform future programming.

DATA COLLECTION

This descriptive case study used multiple data sources, including (a) qualitative document analysis of steering committee member e-mails and planning documents (Yin, 2017) and (b) formal in-depth interviews with the steering committee members. Multiple sources of data supported triangulation (Creswell, 2014). The research team received Internal Review Board approval before the first meeting of the steering committee.

Participants

This study's population was the state strategic-planning steering committee composed of the state extension director, the three state program leaders, and 25 individuals identified by the extension director as a part of the state steering committee ($n = 29$). The 25 individuals selected by the extension director included campus-based state specialists, county agents, and State Agriculture Experiment Stations (SAES) employees. Each Virginia Cooperative Extension region and program area received equality and equity in representation across each organizational level on the steering committee.

Data

Volunteer participants on the steering committee participated in open-ended interviews. Eight [$n = 8$] study participants completed the voluntary semistructured interview. Those interviewed represented all four extension employee groups within the steering committee, campus-based state specialists, county agents, and SAES employees. The interviews allowed the strategic-planning steering committee members to offer their opinions and thoughtful insights (Gubrium & Holstein, 2001).

The collection of documents and archived records related to the activities of the strategic-planning work included materials from the Virginia Cooperative Extension website, archived staff records from earlier planning meetings for previous conferences, Virginia Cooperative Extension annual reports, and steering committee e-mail communication and transcriptions from all strategic plan focus groups. These documents serve the case study by corroborating informa-

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tion from other sources and providing additional inferences (Yin, 2017) that could be pursued during the interviews.

Data were collected throughout the strategic plan steering committee process. Steering committee meetings and interviews were audio-recorded and transcribed verbatim. A team of faculty and graduate students collected the observational data and all transcriptions of recorded data.

DATA ANALYSIS

Data analysis commenced in 2017 after the conclusion of the 5-year strategic plan. One research team member, previously uninvolved in the data collection, read through all the materials twice to gain awareness of the data (Corbin & Strauss, 2008). The analysis process followed the constant comparative method in which “joint coding and analysis” (Glaser & Strauss, 1967, p. 103; 2017) are conducted, where “each incident” is “compared with other incidents for similarities and differences...to identify properties and dimensions” (Corbin & Strauss, 2008, p. 73). Codes were solely developed based on emerging information from the data (Creswell, 2014). Codes were cross-checked to create an intercoder agreement. The agreement was based on whether “two or more coders agree[d] on codes['] use for the same passage of text” (Creswell, 2014, p. 203). These codes were then grouped with like codes in a collaborative analytical process. These like codes were then combined into the resulting themes.

RESULTS

From the semistructured interviews with the steering committee members ($n = 8$), three themes emerged in response to the research questions:

- Effectiveness of the team enhanced results.
- Context and process can inhibit stakeholder participation.
- The steering committee needs a commitment to diverse voices.

R1: HOW DOES THE STEERING COMMITTEE INFLUENCE THE PLANNING PROCESS?

Effectiveness of the Team Enhanced Results

Steering committee members identified that the implementation process was effective because the steering committee could form a team. A member reflecting on their 2-day retreat relayed:

I think the overall steering committee meshed by having that extended meeting. We became a team because we spent enough time together, and we fought a little bit, and we struggled to get through the process. We became a team.

The team development efforts resulted in honesty between team members, a safe environment for sharing ideas, and support between team members that allowed for the work to be effectively conducted. The team was influenced by constant reflection on how the process may be received and perceived throughout the organization.

Steering Committee Knowledge Matters

At the planning table, individuals negotiated and influenced the planning process (Cervero & Wilson, 2006). In this process, the steering committee relayed their valuable knowledge about the system derived from their insider status and employee perspectives of the process. The team members recognized the expectation of heavy attendance at one specific meeting because of the proximity to the main campus and how it would affect the facilitation of other parts of the meeting. Therefore, they adapted the format to accommodate the extra influx of attendees. The steering committee's knowledge of their employees and clientele behaviors informed their planning process.

R2: WHAT WAS LEARNED BY THE STEERING COMMITTEE TO IMPLEMENT A BETTER STRATEGIC-PLANNING PROCESS?

Context and Process Can Inhibit Stakeholder Participation

Even with the best strategic-planning process, barriers to participation will be present. The steering committee identified that the concurrent budget cut caused uncertainty among all stakeholders and put a tight timeline on all participants.

Purpose

Stakeholders inside and outside the organization acknowledged the existential nature of the pending state budget cut, causing a need for the committee to clarify that the process was a planning and strategy exercise rather than a reorganization process.

One member during a reflection on the process noted:

[We had to] continually help them understand that it's not a restructuring process but a program planning process.

Because the strategic-planning process was occurring simultaneously, the organization was facing a budget cut, and stakeholders participated in the strategic plan focus group while they were experiencing fear and apprehension. Stakeholder concerns resulted in individuals' advocating for their specific programs rather than focusing on the whole organization's best interests.

Motivation

Throughout the process, the steering committee recognized the reluctance of internal stakeholders to participate. In a planning meeting, a member said

There's always going to be moaning and groaning now. That's why I said somebody [is] going to have to step in and say, "You have to be at this meeting."

As indicated in this quote, one of the team's strategies was for high-level leadership, such as the Director of Extension or the Regional Directors, to emphasize the importance of participation.

Timeline

The steering committee used its insider organizational knowledge to address some of the common planning challenges. One exchange of the team included the following:

Steering Committee 1: We have a 10-month timeline, and we're going to have to do this right away. This needs to be a part of the district meetings....

Steering Committee 2: SPLs [State Program Leaders] want time with the agents too. We may have to rearrange some things.

To address the competing time commitments, the team tried to situate the strategic-planning process alongside the staff or internal stakeholders' program-planning work flow.

Ensuring that the strategic-planning process aligned with the organization's annual planning process supported agents' integrating the conversations they had about strategic planning into their yearly planning around programming.

The steering committee needs a commitment to diverse voices.

The steering committee worked to include department heads, agents, state specialists, the staff at the Agricultural Research and Extension Centers, and [State] State University, [University's] 1890 partner institution, in the process.

Navigating Nonuser Voice Inclusion

The steering committee was committed to "[getting] as many voices involved as possible." The steering committee was concerned with getting wide-ranging representative organizations. The steering committee members discussed whether they had "bankers on there, financial side of business," "immigrant-serving services," "organic producers," and "pet breeders," for example. They then developed strategies to engage nonusers. One steering committee member stated:

[I]t's going to take a personal phone call, a personal invitation, because otherwise, they aren't going to come.

The steering committee settled on sending personalized letters to more than 370 groups and followed up with phone calls to stakeholders when possible. A steering committee member reflecting on the process stated:

[W]e worked hard to make sure our list of invitees was comprehensive, and we talked to a lot of people to make sure we had the right groups listed, and we were reaching out to groups that we didn't work with—not just people we work with now, but nonusers.

Team members placed focus on inviting wide-ranging user and nonuser participants. The steering committee painstakingly reflected on how groups would be designed; they made an intentional choice to co-mingle different populations, interests, and perspectives to help cross-pollinate ideas. But combining users and nonusers into the same groups did not allow an opportunity to frame the conversation for nonusers, leading to nonusers' confusion. One steering committee member commented:

[O]ne place, the Executive Director came [from a new audience statewide agency]....I saw him two weekends ago at a National Conference, and he just felt overwhelmed according to him, totally out of place....[T]he conversation was dominated by people who appeared to have an agenda.

Despite not being able to educate nonusers, many voices from within and outside the organization were well represented in the data.

Navigating Historic User Voice

Extension has long-term organizational stakeholders who hold political and social clout (Conone, 1991) (e.g., agricultural commodity groups or generational 4-H volunteers). These long-term relationships come with entrenched expectations of services, educational opportunities, and audiences to serve. The steering committee discovered that a membership-based organization sent a representative to multiple external stakeholder meetings to ensure that key points were included to have an outsized influence on the analysis process. Virginia Cooperative Extension and the steering committee realized that if they were to successfully recognize their Strengths, Weaknesses, Opportunities, and Threats (SWOT), they needed valid and fair data to analyze. Once it was discovered that the organization was trying to alter the study's outcomes, such "manipulation" was considered during the report's theme development. The steering committee handicapped the data so that this organization could not have an outside influence on the results.

DISCUSSION

The state leadership team chose a process to help them envision and achieve their future, resulting in a 5-year strategic plan using a research-based methodology to inform future programming. Extension's clientele, stakeholders, and fund-

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ing design require extra attention to organizational and social interests. Developing the strategic plan positioned the organization to be flexible and respond to dynamic future concerns (Communications and Marketing, 2010). The resulting plan was framed as a proactive, responsive, and innovative commitment to [state] communities (Communications and Marketing, 2010). Proper planning determined the ultimate success of the information garnered from the strategic planning.

Fetsch and Bolen (1989) emphasized the need to identify the facilitator. Still, this process exposed that the facilitator must be not just an individual but a part of a team with significant engagement with the process and knowledge of the organization. The steering committee took the time to build a team that led them, in their own words, to be more effective in their plan implementation. Even when taking time to make the team, the steering committee still had to navigate expected and unexpected barriers in program planning, including social and political dynamics (Cervero & Wilson, 2006) of timing, participant motivation, and steering committee team interactions.

Strategic planning should happen regularly and often and not be implemented at points of organizational crisis. Planning and organizational adaptation can cause fear at the best of times (Fitzsimmons & Campbell, 1992). This process was in response to a significant environmental change with the reduction of budget. The difference in organizational security exacerbated scarcity thinking and caused fear and concern in internal and external stakeholders.

To ensure organizational adaptation, the steering committee considered the influence that historic stakeholders exerted on the information-gathering process. Historic stakeholders were willing to “manipulate” the established process by “stacking the deck” by sending representatives to the community forums. This observation, also recognized by Conone (1991), reinforced the power challenges that are inherent to a historical organization when attempting to adapt to a changing environment (see also Author, 2018; Donaldson & Hastings, 2020).

The steering committee invited outside stakeholders to participate in feedback sessions to learn how the organization could better serve nonengaged community members. These individuals were identified and invited by the county-level extension educators. Outside stakeholders, particularly nonusers, need access to opportunities to engage in an orientation about Extension’s possibilities before they are asked for feedback on the value that they perceive or expect from the organization. If new audience individuals/organizations are uncertain about what Extension can offer them, then they will not be able to recognize, let alone articulate, the importance of Extension services. Future Extension strategic-planning processes should be aware of the barrier of nonuser potential stakeholder ignorance and intentionally attempt to

support awareness-building interactions between new stakeholders and Extension within the strategic-planning process.

IMPLICATIONS FOR EXTENSION

For Extension to be responsive to community needs, it will require intentionality throughout the strategic-planning process. Those doing the organizational planning need to emphasize reflection on who is engaged at the table (Cervero & Wilson, 2006) and who is presently and not presently using the Extension system. Reflection is not enough (Smith & Torppa, 2010). Nonusers and desired audiences need to be included in the strategic-planning process, and their voices need to be heard.

Future research for Extension strategic planning should focus on effective strategies to appropriately collect and weigh nonuser and user needs in the strategic-planning process and on how strategic plans are implemented after they are established.

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APPENDIX A. STEPS IN THE VIRGINIA COOPERATIVE EXTENSION STRATEGIC PLANNING PROCESS

Stage in process	Actions taken
A. Initial Steering Committee Meeting	<ol style="list-style-type: none">1. Review purpose, mission, and core values of Extension.2. Build rapport and create a sense of team.
B. Second Steering Committee Meeting	<ol style="list-style-type: none">1. Use SWOT analysis (Pickton & Wright, 1998) to conduct statewide environmental scan and develop appropriate planning strategies.2. Formulate the planning process.
C. Collect Feedback from Across the State	<ol style="list-style-type: none">1. Design a series of open meetings. Considerations include who facilitates, who observes, and who should be invited.2. External: State, regional, and local government, and brainstormed potential audiences.3. Internal: On campus/research-status faculty, county-based employees.4. Conduct open meetings. In this case, there were more than 47 meetings. These meetings are subject to IRB, and all meetings are recorded and transcribed by a team of researchers.
D. Data Analysis	<ol style="list-style-type: none">1. Line-by-line code all open meeting transcripts. A team of researchers is required to manage the volume of data.2. Conduct further analysis on 12,000 individual open codes. The initial coding team organized like codes together. Keep internal and external responses separate.3. Analyze categories and codes into themes within internal and external categories.4. Merge themes from teams and from both internal and external stakeholder feedback into one set of themes.5. Compile reports into tree diagram (Jones et al., 2001) of strengths, weaknesses, opportunities, threats, and issues/concerns by state, district, and county and by program area.
E. Strategic Plan Preparation	<ol style="list-style-type: none">1. Finalize new vision statement.2. Update new mission statement.3. Prepare core values.4. Report results of the statewide environmental scan and appropriate strategies.5. Identify priority areas to be addressed over the next 5 years.6. Develop long-range objectives based on the results of their respective strategic-planning sessions for each unit: target audience, change, subject of change.7. Present and discuss long-range objectives at regional listening sessions.
F. Strategy Finalization and Written Plan Preparation	<ol style="list-style-type: none">1. Formulate statewide long-range objectives based on discussions at regional listening sessions.2. County-, center-, and campus-based faculty develop annual goals and implement programs in support of long-range objectives.3. Develop an evaluation plan. [An outside academic unit] served as a resource to teams in developing evaluation and accountability indicators to measure progress in addressing long-range objectives.
G. Strategic Plan Implementation	<ol style="list-style-type: none">1. Strategic plan is published.2. Strategic plan is used.3. Develop educational materials to support new academic emphasis.4. Collect evaluation data.