

Index

- 1 } Executive Summary
- 2 } Vision for Outreach
- 3 } Trends, Forces, and Drivers of Change
- 4 } Goals, Strategies, Measures to Achieve Our Vision
- 5 } Learning Outcomes Assessment
- 6 } Strategic Indicators
- 7 } Diversity
- 8 } Five-Year Recycling Plan
- 9 } Joint Initiatives, Collaborative Opportunities, and Strategic Investments
- 10 } Appendix

1 } EXECUTIVE SUMMARY

More than a decade ago, Ernest L. Boyer, in his book *Scholarship Reconsidered: Priorities of the Professoriate* (Princeton, NJ: The Carnegie Foundation for the Advancement of Teaching, 1990) proposed that the definition of scholarship be broadened to include not only the scholarship of discovery, but also the scholarships of integration, application, and teaching. Fundamentally, Boyer advanced the concept that scholarship is embedded in the three historic missions of the academy: research, teaching, and service. He also affirmed that scholarship can occur both on the campus and in the community through engaged scholarship. Boyer’s seminal work has informed the context in which Outreach is advancing its vision of supporting Penn State to become the premier engaged university in the country.

Since the last strategic plan three years ago, Penn State Outreach has developed and offered programs and responses to societal issues across the **outreach-engagement spectrum**. These programs range from direct transfer of knowledge and evidence-based interventions to engaged, interactive programming. Our ability to connect the University to the citizens of the Commonwealth, the nation, and the world lies at the heart of our mission as we move into the next five years. Most often, our interactions involve audiences outside the focus of the traditional residential institution: adult learners, children in grades K–12, classroom teachers, farmers, viewers and listeners, summer campers, economic development and government leaders, workforce sectors, health care providers, communities, and students whose ability to come to campus or have access to the University may be limited by distance or other constraints. The interactions with these diverse audiences are facilitated through innovative technologies, mutually beneficial applications of focused engaged scholarship, and extension of the expertise and activities of the University to address issues of importance to the region, the nation, and the globe.

Penn State now reaches one in every two Pennsylvania households, thus facilitating not only the delivery of Penn State courses and faculty expertise, but also encouraging dialogue with the people and communities with whom we interact. Furthermore, Penn State Outreach continues to hold the distinction of being the largest unified outreach organization in American higher education, achieving the vision of being the People’s University. Since its consolidation in 1996, Outreach has evolved into an organization united in its passion for engaging learners, communities, and the University. We have been successful, but we strive for greatness.

This strategic plan reflects a deep understanding of our passion, our resources, and areas where we provide exceptional service. As the Commonwealth and the nation are faced with incredible challenges to maintain global competitiveness and standard of living, Penn State is pressed more than ever to extend its academic research, teachings, and service to meet these challenges. To fulfill the social covenant that is the heart of the University’s land-grant mission, our plan for the future fosters a University culture supportive of engagement and engaged scholarship. It redefines and broadens scholarly activities and builds support for outreach activities.

Our three overarching goals include focusing first on our **learners**, second on our **external communities** and **University partners**, and third on our **Outreach colleagues**. Through concentration on these three major strategic goals, Outreach will advance **Penn State as the premier innovative, engaged university in public higher education**.

2 } VISION FOR OUTREACH

Through the excellence of its academic programs, the innovative use of technology to increase interactive learning, and the application of engaged scholarship regionally and across the nation and the globe, Penn State Outreach will help mobilize all the resources of the University to address societal needs and to enrich the lives of its many constituencies. In so doing, it will advance **Penn State as the premier innovative engaged institution of higher education in the country.**

Outreach will embody the ideals of engagement by drawing together the expertise provided by our academic partners, the faculty from our academic colleges and campuses, and the resources embodied in **Continuing and Distance Education, Cooperative Extension, Penn State Public Broadcasting, the Justice and Safety Institute, and Economic and Workforce Development.**

As we envision a future informed by this strategic plan, we look to the evolution of the nature of engagement, seeing it as more than the application of scholarship to the needs of the community, but rather as involving the citizenry in reciprocal responses to inform and expand our knowledge and understanding. Thus, our working definition of **engagement** is the “scholarship of teaching, research and creative accomplishment, and service that involves citizens and the University working in partnership to create and apply knowledge that addresses pressing societal issues and strengthens civic responsibility and democracy through mutually beneficial relationships.” The **outreach-engagement spectrum** is the direct transfer of knowledge and evidence-based interventions to

engaged, interactive programming.

Following the lead of the Faculty Senate’s recent report, *Recommendations for Documenting and Disseminating Outreach and Engaged Scholarship: Achieving the Promise of the UniSCOPE*, we recognize the importance of outreach and engaged scholarship as dimensions of the scholarship of teaching, research and creative accomplishment, and service. We understand that engaged scholarship reflects a reciprocal, mutually beneficial, two-way exchange between university and community, where the knowledge, expertise, and experience of each both inform and are informed by the other.

Equally, we have expanded our application of the term “**learner**” to include all the constituents of Outreach—from children watching age-appropriate television programming or attending camps and environmental education programs, to students of many ages improving their lives through continuing and distance education, and from farmers, businesspeople, and communities who increase productivity and success, thanks to the application of Penn State research, to our own colleagues and co-workers with whom we build a culture of trust and innovation.

Outreach Mission

Outreach serves as a catalyst, collaborator, and connector to meet the needs of our various constituents and stakeholders with the programs, research, and services of Penn State.

Vision Statement

Penn State Outreach will aggressively advance the University as the premier innovative, engaged institution of higher education in the country. We will enrich the lives of citizens and communities in the Commonwealth and beyond by mobilizing our partners and University resources and knowledge to address individual and social needs.

Outreach Values

People

Convey respect for faculty, students, customers, clients, partners, and colleagues.

Learning

Recognize the power of learning in transforming lives and organizations. Commit to engaging the learning resources of the University with the needs of society. Learn from our work and act upon our learning.

Innovation

Empower employees and encourage individual and organizational creativity to advance the Outreach mission.

Entrepreneurship

Pursue new directions to meet changing societal needs and institutional expectations.

Diversity

Capture the strength that derives from honoring diverse people, perspectives, and programs; think and act inclusively.

Collaboration

Value partnerships and teamwork as fundamental and enriching approaches to our work.

Flexibility

Be open to change and willing to pursue new directions to meet changing societal needs and institutional expectations.

Integrity

Demonstrate ethical and honest behavior in everything we do.

Fiscal Stewardship

Demonstrate ethical, disciplined, and creative fiscal management of central resources, and foster an aggressive entrepreneurial spirit to pursue and implement revenue-producing opportunities.

Disciplined Responsiveness

Build a culture that is focused and determined, and systematically persists in achieving goals in the context of flexible thought and action.

Guiding Principles

- ▶ Engage and empower our communities.
- ▶ Align the strategic priorities and resources of Outreach with those of our University partners.
- ▶ Embrace technology to make learning more accessible and engaging.
- ▶ Advance opportunities to effect global competitiveness and economic, social, and cultural vitality in Pennsylvania's communities and regions.
- ▶ Create and sustain a responsive work environment that is flexible, family friendly, and fair, and is supportive of risk taking, diversity, and innovation.
- ▶ Demonstrate exemplary stewardship of the resources provided by the University and citizens of the Commonwealth and the nation.

} } TRENDS, FORCES, AND DRIVERS OF CHANGE

Next year marks the tenth anniversary of the Kellogg Commission report, *Returning to Our Roots: The Engaged Institution*, on the future of state and land-grant institutions. The commission, chaired by Penn State President Graham Spanier, determined that “it is time to go beyond outreach and service to what the Kellogg Commission defines as ‘engagement.’”

“The United States must compete by optimizing its knowledge-based resources, particularly in science and technology, and by sustaining the most fertile environment for new and revitalized industries and the well-paying jobs they bring.”

Rising Above the Gathering Storm: Energizing and Employing America for a Brighter Economic Future, 2007

Over the past decade, while state and federal support for higher education has continued to decline and societal needs in Pennsylvania have continued to increase, Penn State Outreach has evolved, becoming “more sympathetically and productively involved with [its] communities” in order to fulfill the social covenant that is the heart of the University’s land-grant mission (Kellogg Commission on the Future of State and Land-Grant Universities, *Returning to Our Roots: The Engaged*

Institution, 1999).

In spring 2008, the Faculty Senate and the President approved the report titled, *Recommendations for Documenting and Disseminating Outreach and Engaged Scholarship: Achieving the Promise of the UniSCOPE*. The report charges the vice president for Outreach and the Council on Engagement with implementing the recommendations that advance the University’s commitment to outreach and engaged scholarship.

The 2008–13 Outreach Strategic Plan will address the report’s recommendations to:

- foster a University culture that advances outreach and supports engaged scholarship
- redefine and broaden scholarly activities
- build supportive settings and/or resources for outreach and engaged scholarship, including the establishment of a Center for Engaged Scholarship housed in Outreach

Additionally, our many and diverse constituents and communities in the Commonwealth, and beyond, face numerous critical challenges as our country engages a new role in the global economy. In order to anticipate factors that may affect the attainment of these goals, we have considered the following key trends and drivers of change.

Learners and communities with whom we engage:

- ▶ Changing demographics in the Commonwealth including an aging and expanding older population, increased immigration, increasing numbers of distressed communities ravaged by closing industries and job losses, the massive exodus of the best and brightest of our young people through a nation-leading brain drain, socio-economic disparity in access to education, and major shifts in the workforce due to the retirements of the large baby

boomer cohort will create both challenges and opportunities in the way we work with diverse populations, both in Pennsylvania and across the country.

- ▶ The expectations of learners and partnering entities have evolved. A greater desire for community/student input, customization, and high-quality experiences will challenge all Outreach units and the University as a whole to achieve higher levels of service and engagement.
- ▶ Increased competition and choices for education suggest that both Outreach and the University should become more flexible and innovative in responding to changes in community and learner needs.

“Engagement will not develop by itself, and it will not be led by the faint of heart.”

The Kellogg Commission, 1999

- ▶ Online learning is flourishing, primarily because the University’s programs and products are distinguished from others by their quality and relevance (see Economic and environmental factors).
- ▶ Problems that our communities and constituents face are increasingly complex, requiring multi-disciplinary approaches and solutions that leverage collaboration across the University. In some cases, academic units, community interests, or governmental partners, rather than Outreach, may be the drivers.

Economic and environmental factors:

- ▶ The need for alternative resource streams for higher education, and Penn State in particular, has become evident. Federal and state funding is no longer sufficient to broaden services for the public good. Erosion of traditional revenue sources will limit the University’s abilities to serve the land-grant mission. Private support, grants, contracts, fees for service, and other sources of income must be found to supplement traditional appropriations.
- ▶ The Brundtland Commission defines lifestyle sustainability as development that seeks to meet the needs and aspirations of the present without compromising the ability to meet those of the future. Increasingly, communities, businesses, learners, staff and faculty, and the citizenry as a whole have evinced concern that our endeavors should become more sustainable and model the tenets of environmental stewardship.
- ▶ The current state of the economy—oil/gas prices, the stock market, housing, transportation, insurance, and unemployment—impacts the citizens of the Commonwealth and their opportunities to access/afford education. Demand for creative course offerings that allow commuters to reduce trips to campus, and emphasis on online education, may influence delivery modes. In addition, Outreach has a record of success in interacting with Pennsylvania communities to address issues and opportunities related to energy and the environment.
- ▶ Pennsylvania has a need to attract and retain high-quality talent in the midst of a critical skills gap in the American workforce. While more than 4.3 million jobs have been created since 2003, the majority of those jobs require some postsecondary education. This talent gap creates opportunities for higher education; however, it also creates challenges in finding

qualified individuals to meet demand.

- ▶ Serious challenges in education, health, energy, and economic and workforce development have continued to “show up at the top of the list” of critical areas facing the Commonwealth.
- ▶ Globalization is affecting the national and world economy in many ways, for example, leaving local communities and regions across the Commonwealth with profound challenges that require significant assistance in determining viable future directions. Also, global demand for quality education may provide opportunities to engage the international community. Additionally, the threat of global terrorism, both physical and cyber, drives higher education to elevated roles in ensuring homeland security.
- ▶ The continued, constant evolution of technology and a growing consumer adoption of the use of technologies in the classroom, in digital media, and in the workplace challenges Outreach to stay current by integrating, funding, and supporting these rapidly changing technologies.

4 } GOALS, STRATEGIES, MEASURES TO ACHIEVE OUR VISION

Each of the five core programmatic units—Continuing and Distance Education, Cooperative Extension, Public Broadcasting, Economic and Workforce Development, and Justice and Safety Institute—as well as the administrative support units, have worked collaboratively to develop three goals for the organization, along with specific strategies that Outreach will execute in pursuit of each goal.

Outreach serves as both a catalyst and collaborator in mobilizing the University's resources to enrich the lives of citizens and communities in the Commonwealth, and beyond, to address societal needs. Engaging those whom Outreach serves is critical as the organization moves into the future; it is imperative that we acknowledge the societal needs of our learners—and the escalating number of communities that we serve.

The Outreach Strategic Plan identifies three key goals with which the organization will need to be actively engaged if Outreach is to achieve its vision of:

Engaging Our Learners

Engaging Our Communities and University

Engaging Our People

The first strategy centers on our commitment to help individuals address and achieve their personal goals and to enrich their lives. The second strategy focuses on Outreach's central role serving as the connector between the University and our external constituents to address key societal and organizational needs. And finally, our third strategy recognizes that the salient issue in achieving any success is the necessity of attracting, developing, and retaining the people who play a key role in helping Outreach achieve its mission.

Engaging Our Learners to meet their life goals by providing innovative, flexible, accessible, and learner-centered educational experiences:

Strategies

- Develop and deliver programs designed to meet learner needs.
- Enhance student support services and user-friendly administrative services to help learners achieve their goals and to interact with the University efficiently and effectively.
- Provide support and training to faculty and staff to enhance their ability to maximize student-learning experiences and interactions with the University.
- Continue to increase visibility of Outreach programs to recruit a diverse population of learners.
- Use technology to advance the design and delivery of programs and enhance educational experiences.
- Work to improve institutional policies and procedures that impede learner access to Outreach programs.
- Distribute compelling content on multiple media platforms for general and specific audiences such as classroom teachers and parents.
- Integrate Outreach learning programs with other engagement strategies.

Strategic Indicators

- ▶ Total course and headcount enrollments (credit and noncredit)
- ▶ Total World Campus course and headcount enrollments
- ▶ Headcount enrollment in online and hybrid

learning courses for the World Campus

- ▶ Number of World Campus flexible programs offered, including blended programs and hybrid programs
- ▶ Total adult learner course and headcount enrollments.
- ▶ Number of Extension programs offered
- ▶ Number of Extension clientele contacts
- ▶ Number of adult learners enrolled in noncredit courses/programs
- ▶ Number of adult learners who enroll in certification programs
- ▶ Number of adult learners enrolled in programs for associate degrees, bachelor's degrees, master's degrees, and undergraduate and postbaccalaureate certificates, including those areas identified as high priority by the Commonwealth
- ▶ Percent of the total adult learner population in Pennsylvania and the United States that is served by Penn State
- ▶ Number of adult learners assisted financially through targeted scholarship programs, grants, and specific funds
- ▶ Total youth headcount to include headcount in academic and athletic camps and 4-H traditional club, after-school, and special interest programs
- ▶ Participation in public service media projects, events, and multimedia delivery of content
- ▶ Overall degree of learner (student/participant) satisfaction including degree of satisfaction for individual programs and courses offered
- ▶ Number of learner-centered innovations introduced

Engaging Our Community and University by strengthening Penn State's role as an engaged institution, developing a culture of collaboration with our colleagues in Outreach, across the University, and with particular external communities, especially those related to our thematic areas of health, education, energy and the environment, globalization, and economic and workforce development, to address the needs of those whom we serve:

Strategies

- Expand and promote Penn State's regional, statewide, national, and international leadership in workforce and economic development.
 - Build on Penn State Outreach's community presence and local knowledge by addressing high-priority societal problems associated with energy, health, K-12 education, and economic and workforce development, through two-way partnerships and focused programs, services, and research-based interventions in communities across the Commonwealth.
 - Increase the role of higher education in public media through partnering with academic units to engage with communities.
 - Develop an infrastructure that effectively connects the needs and interests of Penn State faculty and students across—across colleges, academic centers, and campuses—with community needs and interests.
 - Establish a visible and unified University presence in the Commonwealth's major urban and suburban areas.
 - Advance transformative regional engagements in communities, regions, and industry sectors in the Commonwealth.
- Contribute to positioning Penn State as a national leader in university engagement.
 - Cultivate and strengthen relationships with statewide leaders in government, business, education, health care, and the nonprofit sectors to develop a foundational understanding of key economic, social, and community priorities.
 - Infuse engagement and outreach as a key strategic priority among the colleges and campuses, fostering multidisciplinary participation in engagement and outreach initiatives.
 - Generate revenues, obtain contracts and grants, and raise funds to support Outreach and increase revenues to colleges, campuses, and other Penn State administrative units.

Strategic Indicators

- Number of community, corporate, government, and industry partnerships established
- Number of projects/partnerships/programs linked to the thematic initiatives of Health, Education, Energy and the Environment, Economic and Workforce Development, and International programs
- Revenue generated as a result of engagement and outreach activities
- Percentage of staff serving on work-related community boards/organizations
- Number of requests for Penn State participation on advisory boards of national, state, regional, and local government and non-governmental organizations

- ▶ Number of collaborations that result in new resources for a community or region to include the:
 - number and amount of substantive consultations of collaborative grant proposals submitted and funded jointly by Outreach and Penn State faculty
 - number and amount of collaborative grant proposals submitted and funded by Outreach and community partners
 - number of faculty participating in two-way engagement efforts that influence the University as well as the community
 - number of engaged research partnerships
 - number of projects on which there is multiple Outreach unit participation
 - number of engagement teams (Outreach and faculty) working in communities
- ▶ Number of service learning courses/projects conducted as part of community engagement efforts
- ▶ Total volunteer leadership headcount on Extension boards, program advisory committees, and educational programs
- ▶ Number of qualified programs applying for the NASULGC Magrath Engagement award
- ▶ Number of colleges/campuses with Outreach Councils, Faculty Outreach Fellows, and funded grad students and post-docs with outreach responsibilities
- ▶ Number of invited presentations, scholarly articles, and books addressing community engagement, thematic areas, or public service media
- ▶ Achieve the Carnegie Elective Classification in Community Engagement
- ▶ Number of joint funded academic positions and academic centers/institutes between Outreach, including Extension, and the colleges and campuses
- ▶ Number of colleges and campuses engaged in regional transformation initiatives
- ▶ Defined impacts on communities and the University as a result of engagement projects

Engaging Our People by creating a culture in which employees are empowered and respected, have the necessary resources to exceed our partners' and stakeholders' expectations, and are facilitated, recognized, and rewarded by an organization that fully supports innovation, creativity, and collaboration and engagement:

Strategies

- Establish a culture that serves as a magnet, “the preferred place to work,” for the recruitment and retention of outstanding talent through living our core values and embracing empowerment, service, fun, innovation, recognition, respect, and celebration.
- Create opportunities for employee engagement and involvement supporting the Outreach mission of engagement.
- Leverage technology investments to improve employee performance and customer satisfaction.
- Promote a “green” focus and support organizational activities that have a positive impact on the environment.
- Implement a culture of innovation that advances the work of Outreach and engages employees to create new products and services.
- Implement a talent management initiative that focuses on the development of an employee’s career from recruitment through retirement, to include identifying current and future leaders and developing plans to build their skills and competencies, and providing equitable access to professional development opportunities.
- Advance our diversity initiative in developing a workplace that gives respect to everyone,

all the time, and is diligent in efforts to create and celebrate a diverse workforce.

Strategic Indicators

- ▶ Degree of employee satisfaction through the use of pulse surveys in the following areas:
 - career development
 - diversity
 - employee empowerment
 - employee recognition
 - innovation
 - professional and staff development opportunities
 - engagement
 - work-life balance
 - environmental awareness
- ▶ Percent of diversity evident at all levels of the workforce
- ▶ Percent of time that employees spend on creativity and innovation (core job role vs. noncore job role)
- ▶ Number of innovative initiatives across Outreach
- ▶ Investment in technology and quality efforts to improve workplace efficiency
- ▶ Investment in fostering and developing diverse talent pools to build bench strength for key positions and ensure that staff are in the right positions in Outreach
- ▶ Employee recruitment, retention and turnover rates
- ▶ Investment in professional and staff development programs for employees

- ▶ Number of key leadership roles held by Outreach employees in national and regional professional associations
- ▶ Number of national and regional and university-wide external professional awards received by Outreach staff
- ▶ Achievement of all Outreach performance metrics

5 } LEARNING OUTCOMES ASSESSMENT

All courses, conferences, and degree and nondegree programs offered through Penn State Outreach are housed within the University's academic units. Assessment and accreditation are the purview of those academic units.

6 } STRATEGIC PERFORMANCE INDICATORS

Strategic performance indicators are included for each of the three Outreach goals. As the strategic planning period unfolds, we will continue to evaluate these indicators to determine if they are true yardsticks of Outreach progress. Indicators may need to be piloted, assessed, and refined in order to accurately reflect progress toward goals.

The National Association of State Universities and Land-Grant Colleges (NASULGC) is currently developing a common set of metrics for measuring the dimensions of university engagement. When NASULGC has finalized these metrics, Outreach will evaluate and refine our strategic indicators in light of the common metrics being proposed by NASULGC. This will allow greater latitude for benchmarking against peer institutions in the future.

7 } DIVERSITY

The promise of outreach is immeasurably enriched as it is brought to life by and for diverse individuals. Penn State Outreach embraces diversity and the unique potential that diverse personal backgrounds and viewpoints bring to work and learning experiences. Outreach integrates diversity in multiple dimensions, through staff and hiring procedures, programs, clientele, learners, and the communities served.

The mission of Penn State Outreach is to increase access to Penn State's educational resources by engaging learners, external constituents, and communities with the faculty of the University to address societal needs. The interface of Outreach with the spectrum of Penn State's external constituents provides the organization with a broad and inclusive perspective on diversity. Outreach's audiences are youth and adult; male and female; local, national, and international; rural and urban; location-bound and mobile; racially, ethnically, culturally, and socio-economically diverse; differentlyabled; and with diverse sexual orientations. The interaction of these constituents with Outreach reinforces the core values and strategic goals of the organization as well as the wide variety of programs offered and the broad scope of learners they involve. Among its stated core values, Outreach seeks to be an organization committed to diversity and the unique potential that diverse cultural and ethnic backgrounds and viewpoints bring to our work and learning experience. We strive to create a humane environment in the workplace and in the classroom, treating all faculty, staff, students, and customers with dignity and respect, with sensitivity to the need for balance between one's work life and personal life.

The Outreach Strategic Plan for 2008–13 specifically addresses the need to engage our people and continue the work identified in the Outreach Diversity Strategic Plan for 2004–09 which outlines priorities targeted to (1) enhancing the climate for diversity within Outreach; (2) recruiting and retaining adult learners; (3) recruiting and retaining diverse faculty/staff; and (4) enhancing leadership for diversity. The plan also includes a continuation of efforts to serve diverse audiences and provide programming with multicultural content—both important parts of Outreach. The Outreach Strategic Plan 2008–13 has included a core diversity strategy of “developing a workplace that gives respect to everyone, all the time, and is diligent in efforts to create and celebrate a diverse workforce.”

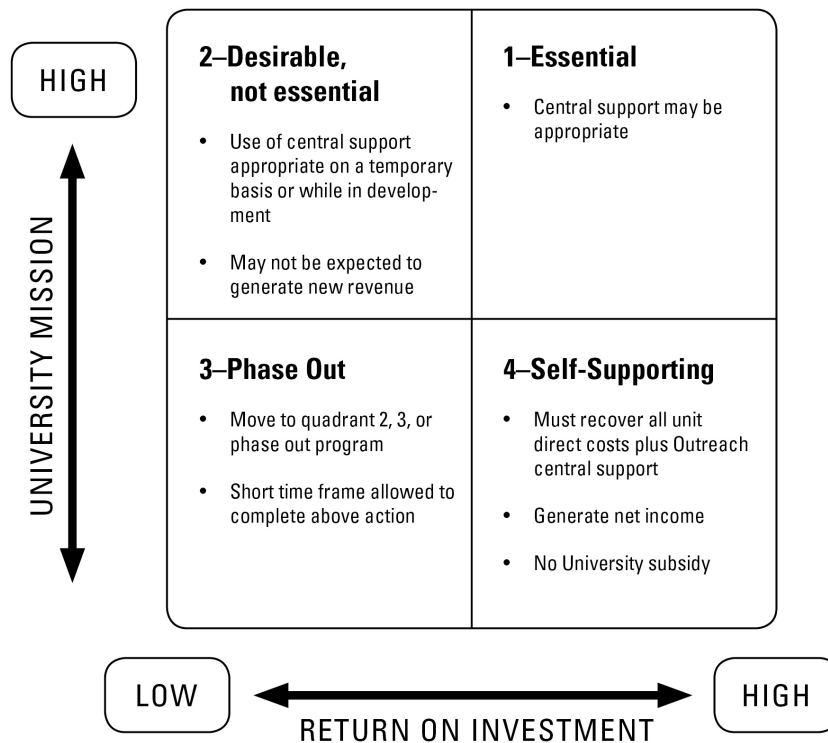
8 } FIVE-YEAR RECYCLING PLAN

To Outreach, 1 percent permanent recycling represents approximately \$120 to \$125 per year. While it is difficult to assess exactly what actions Outreach will take over the next five years to specifically address the recycling targets while also reallocating funding for new priority initiatives, Outreach does have an annual process that it exercises as part of its budget development to address this issue.

As part of Outreach’s annual budget development, Outreach unit executives are asked to annually assess within their units the ongoing viability and priority of all initiatives against a Budget Priority Matrix, and develop a “Stop Doing List.” These two tools annually identify initiatives that are targeted for Outreach recycling and investment reallocation.

The Outreach Budget Priority Matrix evaluates unit initiatives against two scales: University Mission and Return on Investment. To the extent that initiatives score low on both these scales, these initiatives are targeted for recycling. This matrix was the same tool that Outreach used in executing its \$2 million subsidy reduction plan of April 2003.

OUTREACH BUDGET PRIORITY MATRIX



Additionally, Outreach operates using many of the principles of Jim Collins and his teachings in the books *Good to Great* and *Built to Last*. Among the concepts that Collins espouses is the development of a “Stop Doing” list. The “Stop Doing” list is related to Collins’ belief that having such a list is a mechanism for disciplined thought about how to allocate resources.

Collins says, “Creating a great company [organization] requires immense amounts of doing. Yet all that doing diverts us from an equally important and powerful aspect of making progress: deciding what to stop doing. You should create a ‘stop doing’ list to complement your ‘to do’ list.”

Toward that end, during the development of the 2008–09 Outreach operating budget, the collective units of Outreach identified twenty-five things to stop (or reduce/minimize) doing. This list includes:

- eliminating conference paper evaluations in favor of online evaluations
- suspending publication of the semi-annual print catalog for Program and Organizational Development programming
- piloting online exam proctoring to reduce the work that supports proctoring
- eliminating the Continuing Education at University Park criminal justice program
- retiring the legacy distance education SOLO system
- consolidating Oracle databases
- retiring online application functionality of the legacy ATLAS system; implementing the new CRM technology
- stopping or outsourcing internally focused marketing, surveys, and evaluations
- minimizing custom marketing designs in favor of more templates
- reducing/minimizing print-based marketing in favor of using more multimedia and online marketing
- ceasing broadcast of analog Channel 3
- eliminating Research Channel support

9 } JOINT INITIATIVES, COLLABORATIVE OPPORTUNITIES, AND STRATEGIC INVESTMENTS

Outreach has identified the following opportunities that will have significant long-term impact in fostering a University culture supportive of engagement and engaged scholarship:

- Increase the capacity of World Campus by expanding the number of funded faculty engaged in teaching and program development.
- Expand the Public Service Media Initiative to include the creation of a National Center for Public Service Media.
- Create the Center for Engaged Scholarship.
- Increase jointly funded administrative and faculty positions focusing on engaged scholarship and outreach.
- Create a Workforce Assessment Center with the Institute for Research in Training and Development in the College of Education.

10 } Appendix

1. Program Unit Plans
 - a. Continuing and Distance Education
 - b. Penn State Public Broadcasting
 - c. Cooperative Extension
 - d. Office of Economic and Workforce Development
 - e. Justice and Safety Institute
2. Outreach Diversity Strategic Plan

CONTINUING AND DISTANCE EDUCATION

Vision

Continuing and Distance Education (C&DE) will be the Doorway of Opportunity to ONE Penn State for individuals, communities, and organizations, giving them unparalleled access to learning, research, and educational services. In so doing, it will create the people's university of the 21st century.

Mission

To facilitate the power of lifetime education to transform lives by providing exceptional educational opportunities to adult learners and nontraditional learners of all ages within Pennsylvania and beyond

Quest 2015

“**Q**” is for Quality through innovation

“**U**” is for Understanding through data

“**E**” is for Empowerment through communications

“**S**” is for Satisfaction through service and respect

“**T**” is for Teamwork through a relationship culture

Goals

- ▶ Doorways of opportunity
- ▶ One Penn State
- ▶ Success, not just access
- ▶ Innovation, value-added learning
- ▶ Lifetime learners
- ▶ Impact Pennsylvania, serve the nation, reach the world

Strategy 1: Create a learner-centric organization.

- Total credit and noncredit enrollments/headcount/revenue by youth, adults, and seasoned adults
- Market share of adult learners in Pennsylvania and the nation
- Number and percentage of adults enrolled in degree programs, and certificates or degrees awarded
- Course completion rate of adult learners
- Number of learners using learner support services
- Number of adult learners receiving Outreach grants/scholarships

Strategy 2: Establish a culture of empowerment, commitment, recognition, and celebration.

- Percent of new staff who excel on common hiring criteria
- Average number of dollars spent per employee for professional development
- Level of employee engagement (based on survey results)
- Number of award nominations/winners (C&DE, Penn State, outside of Penn State)

Strategy 3: Champion collaboration as the way to work across Outreach and with academic units and communities.

- Number of cross unit projects
- Enrollments and revenue generated by cross unit projects
- Level of Associate Deans' and Chancellors' satisfaction with C&DE
- Level of satisfaction of units with academic colleges and campuses

Strategy 4: Exploit technology and seek insights through data in order to create value-added innovation and increase productivity.

- Percent of staff proficient in use of relevant technology
- Number of technology innovations implemented
- Productivity - ratio of staff to total learners/income/net revenue
- Number of routine C&DE data reports

Strategy 5: Deliver exceptional quality and memorable experiences—always!

- Number of program innovations implemented
- Number of new support services implemented
- Number of first-time and repeat participants

Strategy 6: Develop public understanding of pressing societal problems and “engage” communities to address them.

- Number of external advisory groups
- Percent of staff who hold formal, work-related membership in community organizations

Critical Success Factors

- ▶ Committed, qualified staff and faculty who strive for excellence and are passionate about what we do
- ▶ A cohesive, coherent organization where all units are collaborating and pulling in the same direction—with one another and for one another
- ▶ Strong, positive relationships with all key stakeholders
- ▶ Innovative, high-quality, market-driven programs that serve adult learners
- ▶ The effective use of technology is embraced
- ▶ Strong learner support mechanisms that facilitate access and help ensure success

PENN STATE PUBLIC BROADCASTING

Mission

Penn State Public Broadcasting (PSPB) engages communities in the heart of Pennsylvania with commercial-free programs and educational services that reach across generations to inform, intrigue, and inspire. Connecting a network of lifelong learners, PSPB bridges the local to the global with stories our Pennsylvania communities can invest in, stories invested in the community of Pennsylvania—and beyond.

Vision

In a future where everyone is both teacher and student, both actor and audience, and learning is a continuum stretching across generations, geographies, and historical divides, Penn State Public Broadcasting will innovate the ways that diverse communities share knowledge, creating unprecedented opportunities for engagement and lifelong learning.

GUIDING PRINCIPLE

The creation and delivery of compelling content that engages and empowers communities

Access and Engagement

By 2013, engagement will be fully integrated into all of our processes and as a result, the community and the University will view us as a valuable partner and resource.

Strategies

- Partner with academic units, including administration, faculty, centers, human resources, student life, etc., in connecting with the community to address universal concerns such as sustainability, and domestic violence, among others.
- Cultivate our ability to work both independently and to partner with Outreach and the University to increase our flexibility when working with the public.
- Build strong working relationships in the community.
- Create a formalized, structured ascertainment process with community leaders, legislators, thought leaders, and educators to obtain the opinions of our communities and government representatives, to inform our work and create the basis for engagement.
- Create reliable and fact-based production resources that promote civic engagement.
- Value and resource marketing and promotion within PSPB.
- Integrate engagement as a criteria for green lighting projects.
- Use technologies to make our content more accessible to diverse audiences.
- Expand engagement potential for Penn State and Penn State Public Broadcasting content on multiple platforms.

- Develop a “multiple platforms” culture:
 - Create effective asset management system(s).
 - Formulate effective rights management policies and procedures.
 - Develop systems for periodically assessing impact, and viability.

Compelling Content

By 2013, Creative Services will develop \$3 million+ in externally funded projects, and all productions and projects will meet the definition and standard of compelling content.

Strategies

- Institutionalize an R&D process for developing large-scale projects.
- Filter new productions and projects through the definition of compelling content.
- Review locally produced programs to ensure that they meet the level/standard of compelling content.
- Continue to build a robust relationship with Penn State athletics.

Diversity

By 2013, we will have a culture of diversity in our staff, programming, and the communities that we serve.

Strategies

- Create a more ethnically diverse workplace through focused internship training programs.
- Cultivate a multigenerational workforce.
- Create content and audience engagement strategies for the 55+ demographic.

- Provide services, support, and programming for underserved audiences, such as rural and low-income populations.

Culture of Innovation

By 2013, we will become a place where fresh approaches, risk taking, and creativity will infuse all of the work that we do.

Strategies

- Foster creativity and shared leadership: members of teams lead at different times within the project.
- Customize professional development to an employee’s particular strengths and contributions to the organization.
- Develop a process for suggesting and vetting improving processes, how we are organized, novel approaches, and creative ideas.
- Analyze and replicate successful funding models (Liquid Assets; music theatre).
- Shift paradigm from PSPB being a contractor to being a partner, especially in the area of raising funds for projects.
- Continue to diversify and explore more robust funding streams.
- Adopt the policy that allows environmental sustainability to inform what we do.
- Develop flexibility and family-friendly policies for staff.
- Design flexible business practices that will allow us to attract and retain talented staff.
- Employ innovative staffing strategies that help contain costs while developing talent—robust internship programs; hiring graduate assistants; etc.

Public Service Media

By 2013, Penn State Public Broadcasting will be the national leader in public service media.

Strategies

- Create a National Center for Public Service Media.
- Attract funding to support the center and initiatives.
- Develop communication materials to educate partners about the power, strength, and purposes that public service media can provide.

Pre-K–12

By 2013, PSPB will be a recognized, trusted resource for teachers and a provider of creative tools for students to enhance their thinking, learning, and technology skills.

Strategies

- Continue the Keystone eMedia partnership with WGBH, focusing on core content areas of literacy, English, and social studies.
- Create an internal communication system so that content being developed in other parts of the organization (PSPB) is shared with Educational Services for classroom use.
- Expand the educational gaming concept.
- Foster media literacy in K–12.

COOPERATIVE EXTENSION

Mission

Penn State Cooperative Extension aspires to be the most trusted agent of change in Pennsylvania communities, responding rapidly with research-based solutions to life opportunities.

Environmental Trends and Forces

- ▶ There is a rapidly increasing need to address issues and opportunities related to natural gas exploration, renewable energy sources, environmental accountability—particularly with regard to watershed management—and local tax reform. The emerging priority for youth development centers on science, technology, engineering, and math education. Ongoing needs exist to address healthy lifestyles and to support the state’s agricultural interests.
 - ▶ The world economy is rapidly shifting due in large part to forces associated with globalization, leaving many of our communities and regions at a crossroads in determining strategies for future viability and prosperity.
 - ▶ The problems our communities and constituents face are increasingly complex, requiring multidisciplinary approaches and solutions.
 - ▶ The most pressing needs of our stakeholders and communities extend well beyond the traditional focus of Cooperative Extension. This is particularly true in the Commonwealth’s metro areas.
- ▶ National leaders are challenging universities to stretch, to sharpen their vision about their value and relevancy to the public and nation at large.

Strengths

- ▶ Very talented, highly motivated action-oriented educators, staff, and faculty
- ▶ Strong local connections
- ▶ Catalysts of change
- ▶ Unbiased and objective
- ▶ Direct connection to research and technology

Opportunities

- ▶ Improve our agility and flexibility
- ▶ Be more proactive
- ▶ Improve transfer of state-of-the-art information and technology
- ▶ Act as one university outreach system
- ▶ Empower self-directed teams
- ▶ Link to expertise and resources across the University
- ▶ Improve accountability to stakeholders
- ▶ Decrease administrative activities

Agriculture and Environment

Strategies

- Provide leadership by facilitating partnerships of divergent groups and building common ground to solve problems resulting from the impacts of agriculture on the environment. Facilitate and cultivate partnerships that integrate sectors—from the builders, realtors, environmental NGOs, local governments, and regulatory/assistance agencies, to the producers, agricultural associations, and scientists.
- Through these partnerships, craft strategies and consequent actions that will remove barriers—including policy barriers—and result in improved on-the-ground implementation of nutrient and sediment control efforts. The long-term goal of this effort is significant improvement of Pennsylvania’s local watersheds. The expected outcome of improvement of the quality of local watersheds is an aggregate, long-term diminishment of Pennsylvania’s contribution to the Chesapeake Bay watershed degradation.
- Identify agriculturally impaired watersheds and provide leadership for collaboration of stakeholders to address the issues in the watershed. Start with a small watershed and build from there to have four to five in process within the year.

Economic and Community Development

Strategies

- Develop Phase 2 of the natural gas development, move beyond land leasing to include infrastructure, business development, environmental impact, etc.
- Focus our programs more effectively across county and regional lines, more clearly designating which of our economic and community development programs will be available statewide and how this will occur.
- Better engage faculty in other colleges in our programming, both bringing their expertise into our activities as appropriate, and finding ways to support their own interests, such as brokering local internships, service learning projects, applied research, and other activities.
- Strengthen existing partnerships with local government associations and other stakeholder groups.
- Link workforce development and entrepreneurship with new business development.

Energy

Strategies

- Develop partnerships with state government, the University, industry, etc., focused on alternative energy strategies, policies, and practices.
- Facilitate and support community and industry partnerships centered on alternative feedstock development, woody biomass development, and feedstock inventory projects.
- Improve public understanding of the potential for carbon credits, renewable energy credits, and nutrient credits for financing projects.
- Serve as a catalyst to promote energy efficiency strategies, practices, and technologies.

Family and Consumer Sciences

Strategies

- Build partnerships between the University and Commonwealth communities to promote healthy lifestyles that focus on the prevention of chronic disease, obesity, heart disease, and diabetes.
- Focus on rural women's health by building on existing partnerships and successes with the College of Health and Human Development and the Penn State College of Medicine.

Youth Development

Strategies

- Strengthen science, technology, engineering and math (STEM) efforts in youth development programs.

- Strengthen volunteerism in the youth development area and beyond.

Administration and Operation

Strategies

- Continually scan the environment for emerging issues and opportunities that fit with Extension's mission and the University's expertise. Increase collaborations across the University and externally.
- Strengthen program team functioning: training, mentoring, workflow, team dynamics, roles, etc.
- Examine staff and professional development systems to determine effectiveness and direction.
- Ramp up effectiveness of evaluation (programs and staff), rewards, and reporting.
- Develop a staffing plan (identify competencies for hiring and training).
- Track impacts against financial investments. Determine direction and implement a plan for organizational evaluations, such as economic impact, environmental impact, etc. Develop goals for forestry-fisheries, production agriculture around economic impact, managing the risk and value added.
- Develop an entrepreneurship effort and advance the program leader assignment to provide leadership for the area.
- Determine and develop publication support around issue areas.
- Simplify reporting system.

Strategic Performance Indicators

Contacts

- ▶ Number of participants served per program statewide and per county

Volunteers

- ▶ Number of volunteers per program statewide and per county

Publications

- ▶ Number and list of peer-reviewed journal articles related to Extension, outreach, public service, and engagement authored by Extension educators, faculty, and staff
- ▶ Number and list of Extension publications authored by Extension educators, faculty, and staff
- ▶ Number and list of conference presentations related to Extension, outreach, public service, and engagement authored by Extension educators, faculty, and staff

Funded projects

- ▶ Number and list of programs and projects by funding source

Alternative funding

- ▶ Number and amounts of grant proposals submitted—by program or issue area
- ▶ Number and amounts of grants funded and alternative revenue generated through fees and gifts—by program or issue area

Partnerships

- ▶ Number and list of program partners, as evidenced by shared funding and in-kind contributions to programs—per program area

- ▶ Number and list of local, state and national board and advisory committee memberships for Extension educators, faculty, and staff

Economic Impact

- ▶ Increases in per capita income among populations targeted by Extension programs and interventions

Awards

- ▶ Local, regional, state, and national awards associated with Penn State Extension work

Stakeholder Satisfaction

- ▶ High satisfaction ratings by Extension program participants
- ▶ High satisfaction ratings by county administrators

OFFICE OF ECONOMIC AND WORKFORCE DEVELOPMENT

Vision

The Office of Economic and Workforce Development will lead and facilitate Penn State as an international model for twenty-first century land-grant university engagement to catalyze statewide economic and community vitality.

Mission

The Office of Economic and Workforce Development (OEWD) advances economic prosperity in Pennsylvania and beyond by engaging the resources, expertise, and intellectual assets of OEWD, Penn State, and its partners with the needs of communities, companies, and nonprofit organizations.

Guiding Principles

In service of Penn State's land-grant mission, the Office of Economic and Workforce Development:

- ▶ engages in developing globally competitive regions, industry sectors, and businesses in Pennsylvania
- ▶ tailors efforts to the economic and workforce needs of regions, communities, clients, and partners

- ▶ advances opportunities to effect economic, community, and cultural vitality in Pennsylvania through sustainable economic and workforce development
- ▶ serves as a leader, catalyst, facilitator, and partner in identifying and implementing university programs and public infrastructure with transformative potential
- ▶ creates and sustains a responsive work environment that supports risk taking and innovation; employs highly talented and competent staff; and is flexible, family friendly, and fair
- ▶ stewards resources and returns exceptional value to the Commonwealth, sponsors, and partners

Within Outreach's strategic goal for engagement, OEWD has three broad strategies to pursue its vision and advance its mission. These are (1) to expand and focus Penn State's economic and workforce development (EWD) role and impact; (2) to provide leadership for Penn State EWD activities; and (3) to strengthen OEWD unit capabilities.

To expand and focus Penn State's economic and workforce development role and impact

- Elevate the University's dialogue, capability development, and activities related to appropriate University EWD roles.
- Develop or increase strong partnerships with state leaders in EWD activities.
- Participate in national dialogue on University engagement.
- Develop the University's capacity to define, interpret, and analyze EWD activities and strategies.

- Build structures and programs to ensure that the University's expertise is developed and renewed on an ongoing basis.
- Coordinate statewide EWD planning and engagement initiatives.
- Connect research and service opportunities in collaboration with PennTAP, the Industrial Research Office, and the Colleges.

To provide leadership for Penn State Economic and Workforce Development activities

- Establish a pilot initiative on University engagement and regional competitiveness.
- Establish a Center for Collaborative Policy for the Commonwealth.
- Collaborate with the College of Earth and Mineral Sciences/Office of Economic and Workforce Development.
- Partner with key stakeholders and Penn State leadership around the Commonwealth on initiatives .
- Develop relationships that are supportive of a national model.
- Develop organizational capacity and structures to strengthen the University's ability to engage its resources with the needs of communities, companies, and nonprofit organizations.
- Create a new OEWD division—Economic Engagement Initiatives.
- Create approaches to organizing Penn State's capabilities to facilitate regional and industry sector transformation efforts.
- Develop a cutting edge national program model (s) that leads to regional/community transformation.

To strengthen OEWD unit capabilities

- Develop applied research capability focused on assisting communities and regions to define issues and needs. (Create a Center for Regional Economic and Workforce Analysis by further developing the Workforce Assessment Center/EWD Initiative.)
- Provide focused services, such as managing partnerships, brokering services, and providing direct assistance, possibly fee-based, to business, industry and government partners to increase the competitiveness and entrepreneurship of the Commonwealth.
- Establish a Business and Entrepreneurship Development Initiative (PennTAP and the Small Business Development Center [SBDC]).
- Provide a one-stop Penn State Economic and Workforce Development portal and manage responsibility for long-term, broad-scale regional and community engagements.
- Provide PennTAP and SBDC core and extended services to business and industry
- Develop OEWD Support Functions (government partnerships, marketing, curriculum design, and development).

JUSTICE AND SAFETY INSTITUTE

Mission

The Justice and Safety Institute (JASI) will improve the effectiveness of justice-related services by mobilizing its internal resources, while also leveraging higher education and research assets from within the University, to better serve our communities and stakeholders.

Vision

JASI will serve as a recognized leader in justice-related training, education, and organizational development for agencies and communities across local, state, national, and international levels. The primary beneficiaries of JASI programs are adult learners in programs with focus in areas of law enforcement, child support enforcement training, and family and domestic relations. JASI will work to promote the University as a benchmark educational institution committed to cultivating and supporting Outreach and adult education initiatives.

Values

- ▶ We operate as a self-supporting Outreach unit.
- ▶ We view our customers or clients as partners.
- ▶ We focus on improving the methods and/or effectiveness of service to our partners.
- ▶ We strive to improve the lives of individuals, families, and communities by aiding justice systems in the development and maintenance

of safe, secure, and just environments.

- ▶ We respect and support our co-workers.
- ▶ We respect all individuals with whom we interact.
- ▶ We provide products and services of the highest quality.
- ▶ We promote diversity within our organization and with those whom we serve.
- ▶ We approach opportunities and challenges with creativity and innovation.
- ▶ We act as good fiscal stewards for our partners and the University.
- ▶ We interact with internal and external customers in an open and honest way.
- ▶ We continuously monitor our success and opportunities for improvement through ongoing assessments and evaluations.

Engaging Our Learners

To meet their life goals by providing innovative, flexible, accessible, and learner-centered educational experiences

Strategies

- Complete implementation of standard processes for all electronic and paper outputs (December, 2009).
- Convert all JASI outputs to an adopted standard for all print materials, curriculum products, instructional support materials, etc. (December, 2009).
- Develop a unified evaluation process for all JASI programs (June, 2009).
- Create and implement a standard JASI brand for the marketing of all outputs (December

2008).

- Develop a JASI Learning Management System (LMS) that will streamline participant registration/enrollment, facilitate online learning opportunities for JASI participants, and automate reporting of participant statistics (June, 2009).
- Accommodate both the professional and personal needs of diverse learners through flexibility in establishing training sites, scheduling, cost considerations, and teaching methods appropriate for adult populations (January, 2009).

Engaging Our Community and University

By strengthening Penn State's role as an engaged institution, developing a culture of collaboration with our colleagues in Outreach, across the University and with particular external communities, especially those related to our thematic areas of health, education, energy and the environment, globalization, and economic and workforce development, to address the needs of those whom we serve

Strategies

- Expand the current level of family law/child support enforcement-related services in Pennsylvania, and cultivate new family law/child support enforcement-related services to additional states (establish a separate initiative for each year of the five-year plan).
- Maintain the delivery of law enforcement portfolio programs at forty offerings a year, and target expansion to new locations (establish four new locations each year of the five-year plan).
- Expand current international law enforcement services to additional nations (add at least one additional nation by 2009).
- Develop impact evaluation research partnerships with other university-based faculty (both from within Penn State and from other educational institutions; a new partnership is to be initiated by fall 2009).
- Increase parent education programs in Pennsylvania communities (add two additional parent education programs over the time span of the strategic plan).
- Provide additional graduate assistantship opportunities every year through 2012 (offer at least two graduate assistantship opportunities each year through 2012).
- Sponsor, coordinate, and supervise additional internships each year of the strategic plan (offer a minimum of four internships every year).
- Expand research or academic partnerships with the College of the Liberal Arts faculty every year of the strategic plan (partner with at least one member of the College of the Liberal Arts faculty every year of the strategic plan).
- Strive to have at least 20 percent of University Park-based JASI personnel participate on University/Outreach councils and committees (achieve 20 percent participation by 2012–13).
- Partner with the College of the Liberal Arts in the establishment of the Center for Justice, Training, and Research (to be determined collaboratively with the College of the Liberal Arts and commencing with the hiring of the center's director).
- Increase JASI total annual revenue by an average of 10 percent per year (revenue target of \$10 million by fiscal year 2012–13).
- Develop a service-costing model that allows for improved contract bidding and better use/management of JASI resources (model to be in place by the end of calendar year 2008).

- Increase domestic general fund revenue by 8 percent per year while keeping expenses at 90 percent of gross revenue (annual average general fund increase of 8 percent through fiscal year 2012–13).
- Increase financial support of University-wide stakeholders to \$1 million by fiscal year 2012–13 (annual increase of 7 percent through fiscal year 2012–13).

Engaging Our People

By creating a culture in which employees are empowered and respected, have the necessary resources to exceed our partners' and stakeholders' expectations, and are facilitated, recognized, and rewarded by an organization that fully supports innovation, creativity, and collaboration and engagement

Strategies

- Institute an annual "State of the Unit" report from the director to all JASI employees (to be completed annually, beginning in 2009).
- Continue to implement policies and procedures that maximize the use of unit technologies (DocuShare, cTool, etc.) to effectively communicate across work groups and locations (annually review and report improvements to the unit, beginning in 2009).
- Enhance direct communications within and between work groups by establishing formal team-to-team meetings (each work group will have an established schedule in place by June 30, 2008).
- Implement the "coaching philosophy" by providing coaching training for all managers and associated training for employees. The focus will be on empowering our workforce (the formal training for managers and supervisors will be completed by December

2008).

- Support and promote ongoing professional development opportunities for all JASI staff and faculty as a means of recognizing the importance of individual professional growth and improving performance of all JASI employees (create documentation to formalize the request and approval process. Provide a "report-back" mechanism for participant feedback on professional development).

Penn State Outreach Strategic Plan for Diversity 2004-2009

The mission of Penn State Outreach is to increase access to Penn State's educational resources through linking the expertise of faculty in the University with the needs and interests of external constituents. The interface of Outreach with the spectrum of Penn State's external constituents opens the organization up to a broad and inclusive perspective on diversity. Outreach's audiences are youth and adult; male and female; local, national, and international; rural and urban; location-bound and mobile; racially, ethnically, culturally, and socio-economically diverse; differently-abled; and with diverse sexual orientations. This experience reinforces that there are many kinds of differences that characterize human lives, both for Outreach customers/clients/students and in the University workplace, an understanding that is reflected in the core values and strategic goals of the organization as well as the wide variety of programs offered through Outreach and the wide variety of learners they involve.

Among its stated core values, Outreach seeks to be an organization that . . .

Is committed to diversity and the unique potential that diverse cultural and ethnic backgrounds and viewpoints bring to our work and learning experience.

Creates a humane environment in the workplace and in the classroom, treats all faculty, staff, students, and customers with dignity and respect, and is sensitive to the need for balance between work life and personal lives.

A commitment to diversity is further embraced within Outreach's strategic goals that include:

Enhance Outreach's environment for work and learning in support of the contributions of individuals from diverse backgrounds.

To advance these core values and this strategic goal and to address the challenges identified within Penn State's *Framework to Foster Diversity*, the Outreach Diversity Strategic Plan for 2004-09 gives special priority to initiatives targeted to 1) enhancing the climate for diversity within Outreach; 2) recruiting and retaining adult learners; 3) recruiting and retaining diverse faculty/staff; and 4) enhancing leadership for diversity. The plan also includes continuation of efforts to serve diverse audiences and provide programming with multicultural content that currently are an important part of Outreach. These initiatives and activities include Continuing Education, World Campus, Penn State Public Broadcasting, and central Outreach support units in

partnership with Cooperative Extension where appropriate; however, Cooperative Extension is included in the plan for the College of Agricultural Sciences.

CAMPUS CLIMATE AND INTERGROUP RELATIONS

Challenge 1: Developing a Shared and Inclusive Understanding of Diversity

Challenge 2: Creating a Welcoming Campus Climate

(These two challenges are highly inter-related and therefore are addressed together in this plan.)

The 2002 Outreach Diversity Climate Survey, which included Continuing Education, World Campus, Public Broadcasting, and central Outreach support units, spoke to both of these challenges. The survey indicated that, overall, there is a positive climate for diverse groups within Outreach and that commitment to diversity issues is widespread. Most staff are satisfied with the climate for diversity, feel that it is comfortable for underrepresented groups, and see fostering diversity as an important priority within the organization.

The survey also suggested that there could be greater awareness and supportive behavior related to diversity issues. Open-ended questions about barriers to creating a positive climate for diversity within Outreach and proposed efforts to enhance the climate for diversity suggested the need to clarify and promote an inclusive definition of diversity, to help staff and faculty understand what is acceptable and appropriate behavior in the workplace, to prepare managers and supervisors to lead proactively on diversity issues, and, more generally, to continue to communicate and educate broadly through a wide variety of forums.

Based on this assessment, Outreach has identified the following actions in response to Challenges 1 and 2 of the *Framework to Foster Diversity*.

1. **Charge the Outreach Diversity Council to expand leadership and strengthen accountability for diversity initiatives within the organization.** This represents a transition from the former Diversity Action Team within Outreach, to elevate the role of the group to focus, stimulate, and assess Outreach initiatives to foster a welcoming work and learning environment for individuals from diverse backgrounds; promote inclusivity in serving students, customers, and clients; and enhance diversity among Outreach faculty and staff. A copy of the charge for the Outreach Diversity Council may be found in Appendix A.

This transition was completed in spring 2004. The Council will meet twice a year with the Vice President for Outreach to report progress and identify issues related to diversity within the Outreach organization.

Responsibility: Vice President for Outreach supported by the Director of Planning and Administration.

2. **Articulate and communicate a definition of diversity for Outreach.** Despite the implicit definition of diversity expressed by Outreach's mission of access, staff feel a need for a clearer understanding of what diversity means, particularly in the workplace. As a priority for 2004, Outreach will develop a definition of diversity for the organization and communicate it to staff and faculty.

Responsibility: Outreach Diversity Council.

3. **Prepare directors, managers, and supervisors through dedicated training to provide leadership for diversity and to respond to diversity issues.** To establish clear and common expectations for Outreach's leadership regarding their responsibility to promote and support diversity within the organization, Outreach will work with the Affirmative Action Office to provide training for all staff at the director and manager level and all other staff with supervisory responsibilities. An initial round of training will be held in 2004; additional opportunities will be made available as time goes on to reach all staff who move into these positions.

Responsibility: Director of Outreach Human Resources.

4. **Provide a variety of program opportunities for all staff and faculty to increase awareness of diversity issues, foster community, and encourage involvement.** This is an ongoing commitment to continue and expand programming for employees that fosters diversity, including sessions at the annual Outreach Professional Development Conference, programs offered by the Outreach Diversity Council, and other professional development opportunities.

Responsibility: Outreach Diversity Council, Director of Outreach Human Resources, and Director of Planning and Administration.

5. **Continue and expand organizational communications that underscore the importance of diversity for Outreach.** Ongoing communication from the Vice President and other Outreach leadership on diversity matters will be continued. New communication initiatives include the expansion of diversity information on the Outreach intranet and progress reports to all employees at regular intervals.

Responsibility: Vice President for Outreach, Associate Vice Presidents for Outreach, and Director of Planning and Administration.

6. **Conduct a diversity climate survey at regular intervals.** Outreach has made a commitment to conduct a diversity climate survey approximately every three years to monitor the climate for diversity within the organization and identify related initiatives on an

ongoing basis. A survey was conducted in 2002; it is anticipated future surveys will follow in fall 2005 and 2008.

Responsibility: Outreach Diversity Council.

Performance Measures:

Trend data collected through the Outreach diversity survey, including the percent of Outreach employees who indicate they are satisfied with the climate for diversity.

Inclusion of support for diversity in Staff Developmental Action Plans (SRDP data).

Log of initiative-related activities/program evaluation results.

REPRESENTATION (ACCESS AND SUCCESS)

Challenge 3: Recruiting and Retaining a Diverse Student Body

Outreach is involved in addressing this challenge through its special commitment to serve adult part-time learners through continuing and distance education programs. World Campus and Continuing Education at University Park are major units within Outreach that recruit adult students to Penn State credit programs and require related strategies to attract and retain adult learners including program flexibility and availability of appropriate student services and financial aid. Outreach further contributes in the spirit of the challenge by supporting diversity in the University's extended informal learning community through a wide range of programs (including non-credit and public broadcasting programs) that serve specialized targeted audiences or the public at-large.

- 7. Enhance the role of continuing education in increasing the number of adult learners at Penn State.** In keeping with its leadership and advocacy roles for adult learners at Penn State, Outreach will be responsive to the recommendations forthcoming this spring from the Task Force on Continuing Education to enhance the role of continuing education University-wide in attracting and retaining adult learners to Penn State. It is anticipated that the recommendations may involve organizational restructuring, policy enhancements, and programming and student services initiatives.

Responsibility: Outreach leadership as appropriate to the recommendations.

- 8. Establish scholarship funds for adult part-time learners.** Financial aid limitations can be a significant barrier to enrollment in higher education for the adult part-time learner. Establishing scholarship funds for adult part-time students is a development priority for

Outreach, with the goal of raising \$1 million in Trustee Scholarship funds over the next four years for World Campus students.

Responsibility: Director of Outreach Development.

9. **Develop a diversity framework for the World Campus.** Online learning communities are open to all aspects of diversity -- geographic, life experience, gender, race, age, and culture among others. Penn State World Campus currently attracts a minority student population slightly higher than the case among adult learners generally, but lower than traditional university campuses. World Campus has established international market plans for the long-term and has entered into partnerships that encourage a more diverse student body (e.g., participation in eArmyU, an agreement with the Organization of American States to promote enrollment in World Campus programs from Latin America, and promotion of World Campus programs on the website of the American Distance Education Consortium which reaches students and faculty/staff at historically black and Hispanic land-grant institutions and Native American tribal colleges). However, during the start-up phase for World Campus, the primary focus has been on growing enrollments within the overall target audience of adult part-time learners. As these initial goals are reached, it is time to begin focusing more specifically on a balanced set of curricula, financial aid and other support services, and recruiting efforts that will enhance the diversity of audiences served, including understanding better the dimensions and impact of diversity in the on-line learning environment for adult students, establishing baseline data (relevant data are not currently uniformly available), and identifying goals and supporting strategies.

Responsibility: Executive Director of Continuing and Distance Education

10. **Optimize program content, marketing, and delivery for diverse audiences.** This represents the ongoing effort within Outreach to provide barrier-free access to offerings including geographical and physical accessibility, accommodation of diverse learning styles, responsiveness to age-related special needs, and bias-free language in published materials. The status of these efforts will be assessed and related initiatives developed and implemented as needed.

Responsibility: Outreach Diversity Council

Performance measures:

Trend data on adult learner enrollments.

Trend data on World Campus enrollments.

Establishment of World Campus scholarship funds.

Challenge 4: Recruiting and Retaining a Diverse Workforce

Outreach has made significant progress in the representation of women among senior staff positions; in fall 2003, 52 percent of grade 26 and above staff employees were women compared to 21 percent in fall 1997. Progress also has been made in the representation of racial/ethnic minorities across all staff levels; from fall 1997 to fall 2003, there was a 66 percent increase in minority Outreach staff. However, the percentage of staff from underrepresented groups remains small—5.5 percent of Outreach employees in staff positions in 2003. Among the three-dozen non-tenure track faculty currently employed by Outreach, 42 percent are women and none are racial/ethnic minorities. (It should be noted that 24 percent of the respondents to the 2002 Outreach Diversity Climate survey considered themselves a member of an underrepresented group based on sexual orientation, ethnicity/race, religion, gender, or physical or mental ability.)

Increasing faculty and staff from underrepresented groups is a priority for Outreach. Tracking of search data begun in FY03 shows that the pool of qualified applicants from underrepresented groups must be increased as an important step in recruiting diverse faculty and staff, particularly in those searches that are advertised regionally and nationally. In the past two years, an average of approximately 6 percent of applicants for Outreach positions were racial/ethnic minorities, disabled or handicapped, and members of these groups represented an average of 5 percent of candidates selected for interviews, leading ultimately to an average of 4 percent of the Outreach hires made in each of the years. We want to see increases at all of these stages.

Outreach already has in place affirmative action search procedures including a specific charge to search committees regarding diversity of candidate pools, advertising in appropriate venues, and networking within professional circles. In addition to continuing these procedures, Outreach will implement the following actions to support greater diversity in hiring.

- 11. Strengthen all vacancy position descriptions to communicate Penn State's and Outreach's commitment to diversity and to include job-appropriate diversity-related factors among stated position qualifications. Include in job interview protocols assessment of the diversity-related qualifications.** Including language, as appropriate to a position, indicating a desire to work with a multi-cultural customer base and support for diversity as important job qualifications, reinforces the value of diversity for the organization and conveys a welcoming climate for diversity to job applicants.

Responsibility: Director of Outreach Human Resources working with units.

- 12. Establish a recruitment fund to support the hiring of diverse staff and faculty.** This fund will be modeled after similar programs at Penn State that provide matching funds in support of diverse hires. As an incentive to units to expand their searches for qualified diverse

candidates, Outreach will contribute centrally a portion of the salary for newly hired individuals who contribute to the diversity of the Outreach workforce; these matching funds will be reduced over time for a given position to assure their ongoing availability across units. This funding has been put in place for FY05.

Responsibility: Outreach Executive Team working with the Director of Finance, Facilities, and Technology and the Director of Planning and Administration.

- 13. Explore the creation of an Outreach internship program for diverse Penn State students and/or in partnership with other institutions of higher education with diverse student bodies to provide experiences that may attract participants to future employment opportunities in Outreach.** “Grow your own” internship programs appear to be a promising avenue for recruiting diverse staff. As a first step toward potentially creating such a program for Outreach, we want to learn from the experiences of others at Penn State including their return on investment in such programs, and also explore possibilities for partnering with other institutions, such as historically black colleges and universities, to provide internship experiences for students in fields related to work in Outreach. This exploratory work will take place during 2004-05, and if a decision is made to move forward, implementation will occur the following year.

Responsibility: Outreach Executive Team working with the Director of Human Resources and the Director of Planning and Administration.

- 14. When openings for Outreach faculty positions occur, reiterate and reinforce the importance of a strong commitment to diversity in the search process through special attention to the composition of search committees, communication by the appropriate Outreach executive with the chair, and access to resources to support an aggressive search. Closely monitor diversity of applicants, candidates, and hires in faculty searches.** Recruiting faculty of color among the approximately three dozen non-tenure track positions within Outreach is a special priority. Every search opportunity will be used to address this priority through strategies that emphasize expanding the diversity of qualified individuals in applicant pools.

Responsibility: Executive Director of Continuing and Distance Education.

- 15. Establish a retention program for staff and faculty from underrepresented groups.** While professional development and other forms of career and workplace support are provided for all employees, Outreach currently does not have a focused retention program for individuals from underrepresented groups. Mentoring and networking opportunities will be developed and implemented to support Outreach employees from underrepresented groups.

Responsibility: Director of Outreach Human Resources working with the Outreach Diversity Council and Outreach units.

Performance measures;

Trend data for searches—number of diverse applicants, candidates, offers, and hires for faculty and staff.

Trend data on employees—number/percent women and members of underrepresented groups on Outreach faculty and staff.

Assessment of specific initiatives, including implementation and outcome data.

EDUCATION AND SCHOLARSHIP

Challenge 5: Developing a Curriculum that Fosters Intercultural and International Competencies

Outreach does not contribute directly to addressing this challenge but is supportive of college curricular efforts in this area through the delivery of general education and other relevant courses via continuing and distance education. In addition, the broad portfolio of programs delivered through all Outreach units to the extended University learning community includes significant multicultural content reflecting the organization's role in support of academic interests across the university and interface with a wide variety of external audiences. Outreach is committed to continuing to work with its academic partners to provide programming that is reflective of and responsive to the diversity of our society.

- 16. Review the Outreach program portfolio to identify opportunities and issues related to multicultural programming.** As many Outreach program offerings change from year to year, it is important to understand trends and challenges related to the inclusion of multicultural content within the Outreach portfolio. Outreach program offerings with diversity-related content will be monitored to inform the efforts of program development and delivery units in this area.

Responsibility: Outreach Diversity Council working with Outreach units.

- 17. Explore dedicating a portion of the Outreach Program Innovation Fund to diversity-related programming.** While much of Outreach's diversity-related programs are driven by academic partners, dedicated funding can serve as an incentive for development of programs in this area and also encourage the development of programming for underserved audiences. The Program Innovation Fund is currently being restructured; diversity will be considered as a potential criterion in the allocation of some of this funding.

Responsibility: Outreach Executive Team.

- 18. Collect assessment data on Outreach diversity-related educational programs to determine effectiveness, including information on audiences served and measures of program outcomes, to guide the ongoing investment of resources in this area.**

Responsibility: Director of Planning and Administration working with Outreach program delivery units.

Performance measures:

Reviews of diversity-related programs.

Development of new diversity-related programs.

Program assessment data.

INSTITUTIONAL VIABILITY AND VITALITY

Challenge 6: Diversifying University Leadership and Management

Many of the concerns under this challenge have already been addressed in Outreach's response to the other challenges within the Framework to Foster Diversity. These include recruitment and retention initiatives including a special focus on positions for which regional and national searches are conducted (many of these are leadership positions), providing training for directors, managers, and supervisors, and enhancing the leadership role of the Outreach Diversity Council. The challenge is also addressed by ongoing efforts within Outreach to provide leadership and professional development opportunities for women and members of underrepresented groups.

- 19. Continue to provide encouragement and support for professional development opportunities for diverse staff members, including the Outreach Internship Program, participation in University leadership and management development programs, and participation on University committees and commissions.** Outreach has used all of these avenues in the past to provide leadership development opportunities for diverse staff and will continue to do so. In addition, the Vice President for Outreach will serve a mentor for the Administrative Fellows Program in 2005-06.

Responsibility: Outreach Executive Team working with unit leadership.

- 20. For all administrative searches (staff grade 24 and above with managerial duties and all administrative appointments), require demonstrated skills in managing diversity as a position qualification. Include leadership for diversity as a factor in annual performance reviews for administrators.** Demonstrated commitment from the leadership

of Outreach is essential for meeting the challenges of the Framework to Foster Diversity at Penn State. This expectation will be clearly stated in position descriptions and individuals in leadership positions will be held accountable through the annual performance review process.

Responsibility: Vice President for Outreach and the Outreach Executive Team.

21. **Work with the chairs of all search committees for administrative positions (staff grade 24 with managerial duties and above and all administrative appointments) to assure a strong commitment to diversity in the search process and access to networks that promote diversity in the pool of qualified applicants.** An aggressive approach that clearly and closely sets expectations for administrative search committees and works with committee chairs and members to identify diverse applicant pools can help to bring qualified diverse candidates forward for leadership positions. For all administrative position searches, an appropriate member of the Executive Team will meet with the search committee chair to discuss expectations and identify strategies for developing a diverse pool of candidates.

Responsibility: Executive Team members

22. **Consider diversity as an important factor for the membership of external advisory groups for Outreach.** Outreach looks to individuals beyond the University for advice and relationship building to better connect Penn State with community and statewide educational needs. External advisory groups for Outreach must include diverse perspectives in order to fulfill these roles effectively.

Responsibility: Outreach Executive Team

Performance measures:

Implementation data for initiatives: Percent of position descriptions that include demonstrated skills in managing diversity and percent of administrative searches which are discussed with a member of the Executive Team.

Trend data on participation of members of underrepresented groups in Outreach leadership positions.

Trend data on participation of members of underrepresented groups in leadership development activities.

Outreach advisory board membership.

Challenge 7: Coordinating Organizational Change to Support Our Diversity Goals

Outreach's diversity initiatives are coordinated through the Vice President's Office by the Director of Planning and Administration with a direct reporting line to the Vice President for Outreach. This coordination includes the Outreach Executive Team, the Vice President's Council, the Outreach Diversity Council, and others in the organization in efforts to foster diversity goal. Outreach's organizational commitment to diversity also includes financial investment including program development funds (from the Program Innovation Fund and the Outreach Partnership Fund) in support of programs with multicultural content or that reach under-served audiences, support for training for faculty and staff, development priority for adult learner scholarships, and the creation of an incentive fund to promote diversity in hiring. At the individual level, staff are held accountable through the Staff Review and Development Plan (SRDP) process (inclusion of Support for Diversity in the Developmental Action Plan will be monitored beginning in the 2004-05 performance review period). At the organizational level, accountability will be addressed through an annual assessment of progress in fostering diversity within Outreach. Under this challenge, Outreach also is very interested in networking with others at Penn State to share best practices and participate in collaborative efforts to build support for diversity.

23. **Prepare an annual update on diversity within Outreach and share with all staff.** This progress report will include the performance measures identified in this plan and recommend refinements to the Outreach Diversity Strategic Plan as appropriate.

Responsibility: Outreach Diversity Council working with the Director of Planning and Administration.

24. **Network with others throughout the university to share best practices and pursue collaborative efforts to foster diversity.**

Responsibility: Outreach Diversity Council.

Performance measures:

Decrease in the percent of Outreach staff who respond "don't know" to items on the Outreach diversity climate survey.

Updated September 2004

Appendix A

OUTREACH DIVERSITY COUNCIL

The promise of outreach is immeasurably enriched as it is brought to life by and for diverse individuals. Penn State Outreach values diversity and the unique potential that diverse personal backgrounds and viewpoints bring to our work and learning experiences. Our organization is committed to creating inclusive learning and work communities and providing an environment that treats all faculty, staff, students, customers, and clients with dignity and respect.

Charge:

The Outreach Diversity Council provides leadership for policies, strategies, and actions to enhance diversity within the Outreach organization. The council reports to the Vice President for Outreach. The role of the council is to focus, stimulate, and assess Outreach initiatives to foster a welcoming work and learning environment for individuals from diverse backgrounds; promote inclusivity in serving students, customers, and clients; and enhance diversity among Outreach faculty and staff. The council is charged to:

- Monitor diversity issues and initiatives in Outreach, including climate, recruitment and retention of faculty and staff, and program development and delivery.
- Recommend policy and strategy to support and enhance diversity within Outreach and contribute to the development and implementation of the Outreach Diversity Strategic Plan.
- Work with others within the Outreach organization to identify and implement diversity initiatives.
- Communicate information and encourage discussion of diversity within Outreach units.
- Identify and implement programming opportunities for staff to enhance awareness and understanding of diversity issues, foster community, and encourage involvement.
- Network with others throughout the University to share ideas, resources, and activities and to implement policies, practices, and procedures in support of diversity.

Membership:

Representative across Outreach: two representatives from each major unit (Continuing Education, World Campus, Penn State Public Broadcasting, Cooperative Extension), four representatives from across central support units (Communications, Development, Finance, Marketing, Program Development, Vice President's Office), and three members-at-large. Ex-officio members include the Director of Planning and Administration, the Director of Human Resources, and the Human Resources Coordinator. Affiliate members may participate on council committees.

Membership should be inclusive of all levels of Outreach faculty and staff and reflect the diversity within Outreach.

Members will serve three-year terms with one-third of membership rotating off each year, with the possibility of reappointment. Membership terms will begin in September, commencing in 2005. Initial appointments to the council will begin immediately, with term length as follows:

Members of the Outreach Diversity Action Team (eight individuals) will transition to the Outreach Diversity Council, five for a term ending in summer 2005 and three for a term ending in summer 2006, with the possibility of reappointment.

A special call for nominations to fill the remaining seven positions on the council will be made; two will be for terms ending in summer 2006, and five will be for terms ending in summer 2007. This call for nominations also will include affiliate members to serve on council committees.

Beginning in 2005, an annual call for nominations (including self-nominations) to fill open council positions will be made each spring to all Outreach employees, with nominations forwarded to the vice president for selection and appointment beginning the following fall. The call will include a request for volunteers who wish to serve in an affiliate capacity on council committees.

Structure:

A chair will be elected by council members to serve a two-year term beginning in fall 2005-06. The initial chair has been appointed and will serve in this role through summer 2005.

Standing committees of the Outreach Diversity Council include:

Climate
Employee Recruitment and Retention
Communications

Staff Program
Outreach Programs and Services
University Networking

Meetings:

The council meets monthly, including two meetings a year with the vice president. Committees determine how best to advance their work.