



The Engaged University:

Transforming the Outreach Organization

National Outreach Scholarship Conference October 3, 2005

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The Engaged University: *Transforming the Outreach Organization*

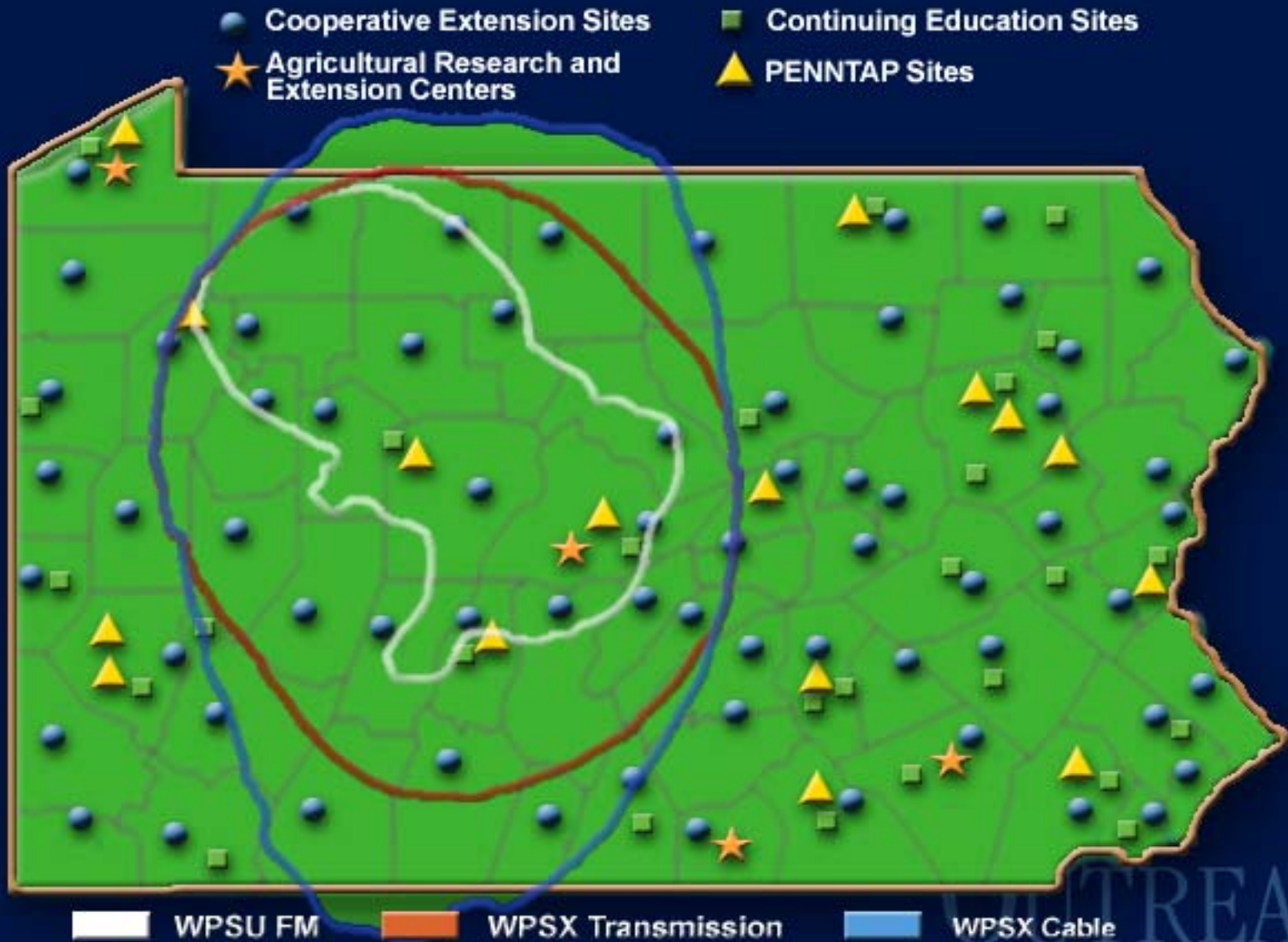
- Where We Were in 2003
- How We Arrived Where We Are Today
- Lessons Learned
- Where We Are Today
- Discussion

Penn State's Reach

2,000 Programs On-Site and Via Technology

- Reaching one in four Pennsylvania households
- Covering 67 counties, 50 states, 80 countries, 7 continents
- Impacting 267,000 youth
- 1,500 faculty applying scholarship through teaching, research, and service
- \$32.4 million in externally funded training and educational programs
- Over 750 full and 250 part-time staff across the state
- Operating budget \$135.9 million
- Public Broadcasting
 - 1.3 million television households
 - 500,000 radio listeners

Outreach in Pennsylvania



Where We Were in 2003: *Internal Challenges*

- **Financial**

- Budget reduction of \$2 million
- Outreach as discretionary income-generator for colleges, cost-control concerns
- Cooperative Extension funding: flat at federal level, reduced at state level, modest increase at county level

- **Organizational**

- Four disparate units merged with little integration
- Large, bureaucratic organization, slow to change and innovate
- Cooperative Extension closely aligned only with College of Agricultural Sciences

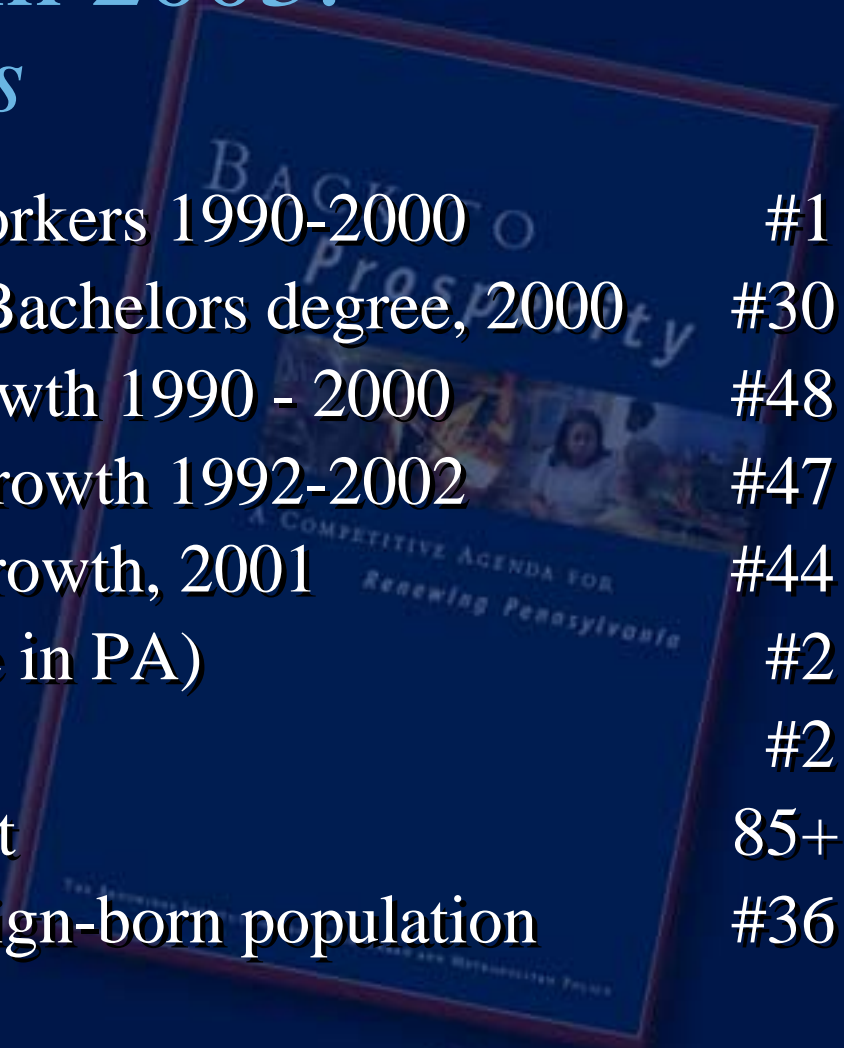
Where We Were in 2003:

Internal Challenges

- **Culture**
 - Focused on size and revenue generation, not impact
 - Traditional top-down management
 - More internally than externally focused
- **Uneven Perception, Expectations within University**
 - Lack of collegial understanding of Outreach roles and responsibilities
 - Lack of awareness of Public Broadcasting's role in an academic environment
 - Internal competition and growth of e-learning
 - Impact of decentralized academic authority/responsibility for CE

Where We Were in 2003: *External Challenges*

- Absolute loss of young workers 1990-2000 #1
- Share of population with Bachelors degree, 2000 #30
- Percentage population growth 1990 - 2000 #48
- Percentage employment growth 1992-2002 #47
- New business starts and growth, 2001 #44
- Nativity rate (born and die in PA) #2
- Percentage of older adults #2
- Fastest growing age cohort 85+
- Percentage change in foreign-born population #36



Where We Were in 2003: *External Challenges*

- **Need to be more responsive to regional/statewide economic, educational, and social issues**
- **Cooperative Extension**
 - Greater needs, less funding
- **Increased competition**
 - Adult learners
 - Viewer attention and community support
 - Funding and public involvement
- **Volatility of public funding**

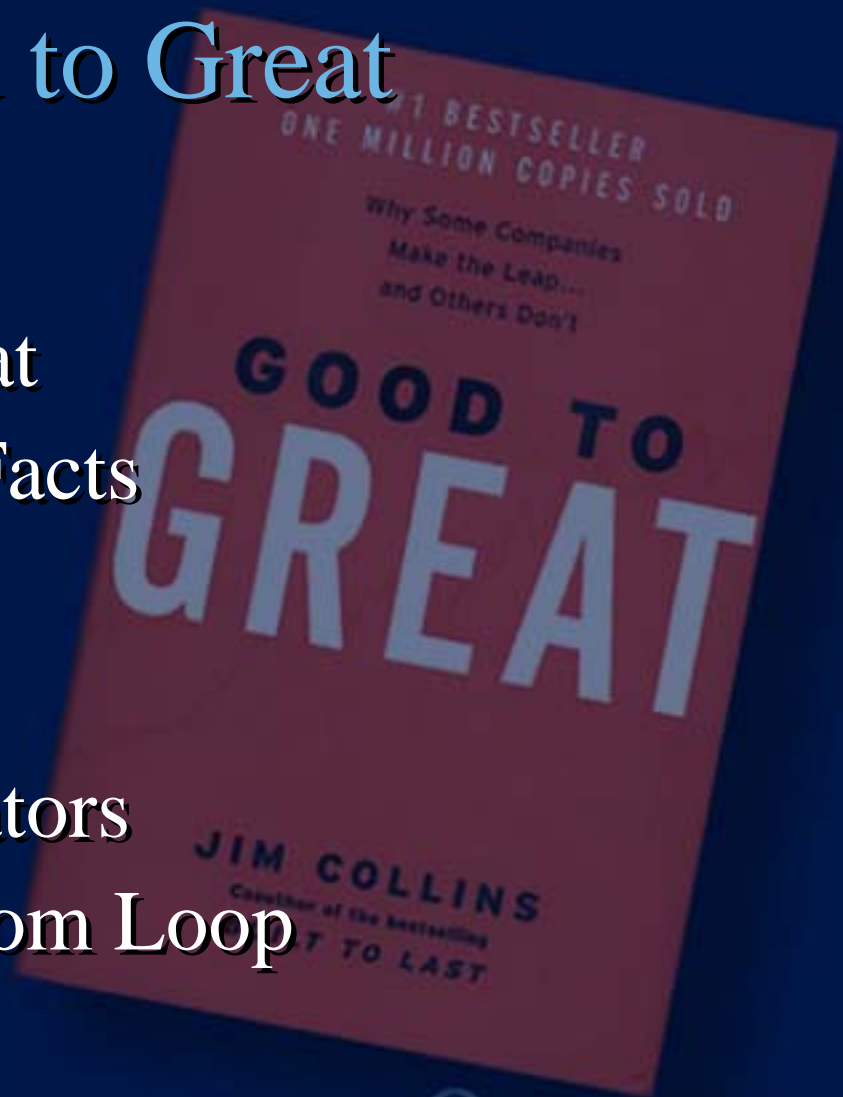
How We Arrived Where We Are

Strategic Positioning Process

- **Anchored in 4 principles**
 - Leadership
 - Excellent Service
 - Entrepreneurship
 - Learning & Community
- **Strategic positioning teams—70 University-wide participants**
 - Academic Relationships
 - Core Competencies
 - Fiscal Stewardship
 - Innovation

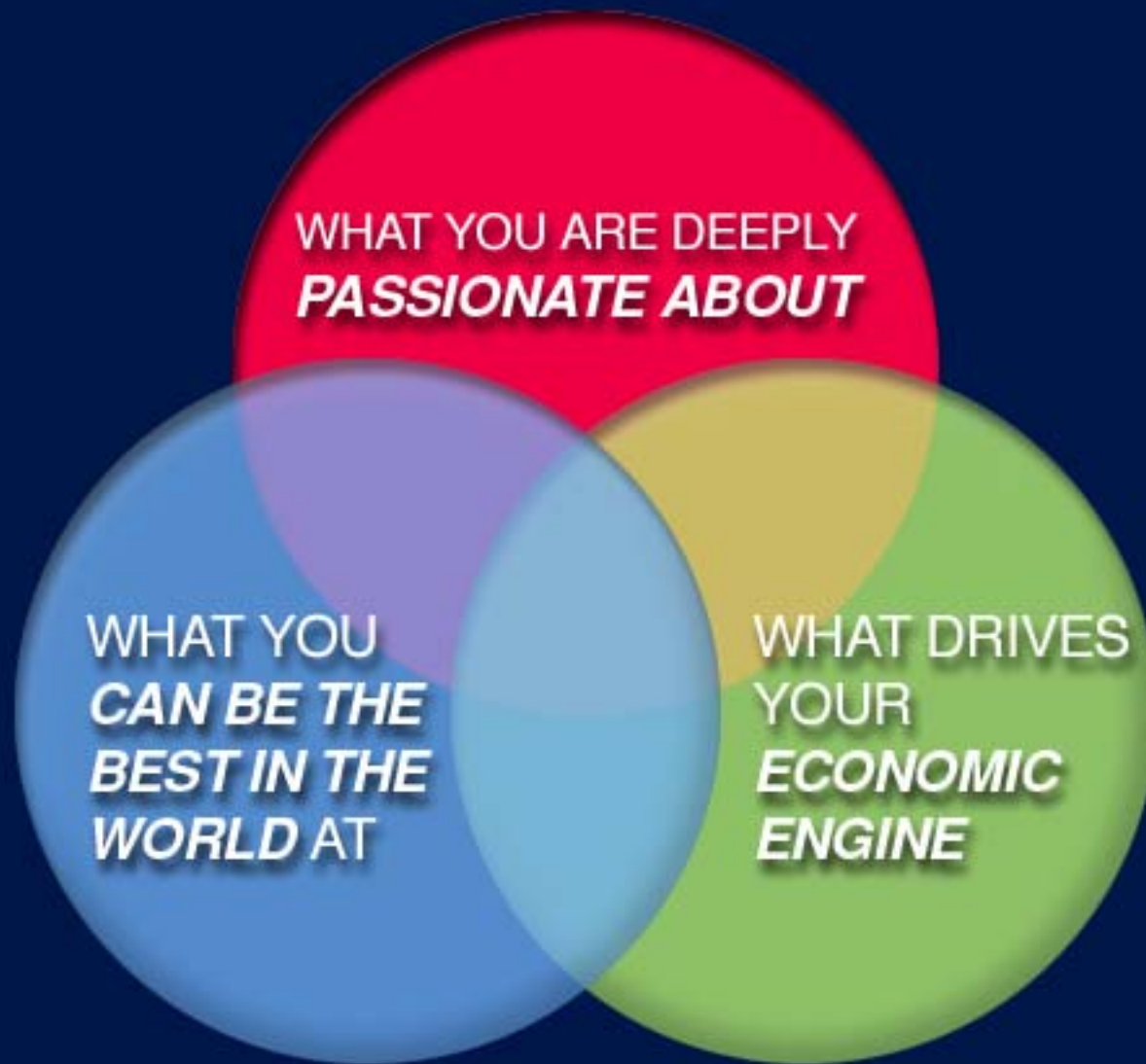
Going from Good to Great

- Level 5 Leadership
- First Who, Then What
- Confront the Brutal Facts
- Hedgehog Concept
- Culture of Discipline
- Technology Accelerators
- Flywheel and the Doom Loop



Collins, Jim. *Good to Great: Why Some Companies Make the Leap...and Others Don't*, 2001

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Three Circles of the Hedgehog Concept

Collins, J. (2001). *Good to Great*. Page 96

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Outreach Hedgehog

“Outreach serves as a catalyst, collaborator, and connector between the needs of our constituents and stakeholders *and* the programs, research and services of Penn State’s colleges and faculty.”



Accelerators of Change

- **Institutional**

- CE Task Force
- Online Course-Sharing Task Force
- University Plan for Reorganization
- Engaging Faculty Initiative

- **National Focus**

- Focus on scholarship of engagement: CIC, NASULGC
- Maturation of e-learning and creation of Sloan Consortium
- Repositioning of Public Broadcasting
 - Reforging/Evolving the Links
 - University Licensees Association
- E-Extension

Outreach Roadmap

Values

- Learning
- Innovation
- Diversity
- Collaboration
- Flexibility
- Integrity
- People
- Fiscal Stewardship
- Disciplined responsiveness

Declaration

Transforming quality of life by engaging Penn State with individuals and communities in Pennsylvania and beyond.

Strategic Imperatives

- Resource optimization
- Excellent Service
- Connection
- Innovation Culture
- Technology Accelerators

Core Competencies

- Catalyst and Connector:
- Needs assessment/market research
- Multi-dimensional knowledge transfer
- Funding/financial mgmt.
- Relationship mgmt.
- Project management

Organizational Capabilities

- Cross-division training
- Research/academic relationship building
- Community relationship building
- Analytical skills
- Grants/contracts capacity
- New products/services
- Alignment of staff

Performance Drivers

- Strategic thematic initiatives
- Allocation of current resources
- New sources of revenue
- Structural change for seamless work
- Systems for data-based decision making

Metrics

- Financial
- Business Processes
- Individuals & Communities
- Learning & Innovation

Operational Processes

- Enhance IT infrastructure
- Costing and pricing
- Secure/use data and info. for decisions
- Cross-division program coordination
- Program planning with academic units
- Aggressive resource recycling

Strategic Positioning Action Plan

- Implement organizational changes to position Outreach for challenges of next decade
- Develop, implement systems to streamline operations and create seamless business structure
- Improve program development process
- Streamline processes to simplify operations, create more seamless organization
- Strengthen financial stewardship

Strategic Focus

- **Become more innovative, responsive, and better aligned with internal and external constituents**
 - Concentrate resources on Commonwealth needs
 - Focus on three strategic themes:
 - Health
 - K-12 Education
 - Economic and Workforce Development
 - Consolidate Continuing & Distance Education
 - Elevate University Outreach Council

Lessons Learned:

First Who, Then What—It's Simply About Your People

- Build executive team of shared purpose and values—model the desired culture
- Aggressively redeploy staff: put the right people in right seats
- Confront difficult personnel changes quickly
- Identify core skills and make training a priority to address skill gaps

Lessons Learned:

Don't Let Culture Eat Strategy

- Flywheel concept: patience and persistence
- Manage expectations
- Never underestimate importance of sensitivity to change resistance, resilience of organizational silos
- Make internal communication a priority
- Empower front-line decision making
- Confront the brutal facts

"Culture eats strategy"

Elson Floyd President, University of Missouri System

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Lessons Learned:

FOCUS, FOCUS, FOCUS

- Create a compelling vision and tirelessly share it over and over and over...
- Become more innovative, responsive and better aligned with internal and external constituents
- Aggressively connect with internal and external constituents in key areas
- Learn to say no

Lessons Learned:

Build Long-Term Sustainable Partnerships

- Align initiatives and work to advance outreach goals of your academic partners
- Build campus communities of interest to advance strategic goals—but be judicious
- Create and use external boards
- Gain participation on key statewide boards and initiatives
- Recognize that you don't have all the answers

"I rely on the kindness of strangers"
Blanche Dubois in *A Streetcar Named Desire*

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Where We Are Today

Access and Engagement Through Technology



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