

**Making an Informed Decision:
A Guide to Extension Project Prioritization**

Abstract

Extension is often asked by stakeholders to respond to difficult and complex issues and tasks. Making those decisions includes a three-part obligation according to McDowell (2001), because the purpose of the Cooperative Extension Service is the following:

- To seek to know the problems of ordinary people and bring those problems to the attention of the researchers.
- To deliver functional education, based on the best scholarship available, to ordinary people, and to help solve their problems.
- To collect political support from the beneficiaries of extension programs in order to fund the continued research and education of ordinary people of the society – not just, or even primarily, farmers (p. 69).

Responding to all of the identified problems with the above criteria is not feasible in terms of capacity and resources (e.g., time or dollars). To function in the most effective manner, it is necessary to be selective and allocate resources to those programs and projects with the best potential for positive impact and/or public value (Moore, 1995). As a result, it becomes imperative to ensure project decisions are made only after considering multiple factors.

The *Making an Informed Decision Guide* has been developed to help direct decision-making for program and project planning through the use of specified criteria. *The Guide* provides a framework to examine the rationale behind each criterion to lead a decision-maker to a thoughtful and efficient decision. By using the eight criteria identified, those projects can be identified which should take precedence when it comes to staff resources and effort.

The process for choosing the eight criteria within The Guide was based on a number of factors, including the goals of the Cooperative Extension Service as determined by United States Department of Agriculture's National Institute of Food and Agriculture (<https://nifa.usda.gov/extension>), resources outlined on eXtension (<https://extension.org/>), and years of Extension service by the authors and colleagues (McDaniel, 2013). Additionally, an extensive literature review was conducted to understand the most relevant issues currently facing Extension, as well as the response to these issues from Extension programs around the nation. Topics explored included how to conduct successful Extension programming, the value of Extension, Extension branding, the best way to engage with stakeholders, how to create effective partnerships, and so forth. A cross-section of this literature included the following articles: Abrams, Meyers, Irani, & Baker, 2010; Fetsch, MacPhee, & Boyer, 2012; Hoag, 2005; Kalambokidis, 2004; Martin, Leuci, & Stewart, 2014; Moore, 1995; Pritchett, Fulton, & Hine, 2012; Walker, 2003; and Woods & Doeksen, 2003. It should be noted that no single piece of literature clearly identifies these criteria, thus making the Making an Informed Decision Guide even more valuable.

Another important aspect of Extension work is maintaining positive relationships with community stakeholders and one strategic way to do this is by maintaining open lines of communication. Once a decision has been made, this guide can also be used to effectively communicate the rationale behind that decision. This is an especially important step to take with stakeholders whose proposed projects are requesting resource allocation beyond current means or mission boundaries.

Finally, *The Guide* can be used to ensure that Extension partners are cognizant of the organizational priorities and mission. By sharing the *Making an Informed Decision Guide* with community stakeholders, it helps to clarify the Extension mission by providing a structure for conversations with stakeholders, partners, funders and even other Extension staff. The tool can be downloaded from the WSU Extension Evaluation Resources website at:

<http://ppe.cw.wsu.edu/evaluation-resources>.

How to Use *The Guide*

The *Making an Informed Decision* guide helps Extension decision-makers apply an objective rating scale to proposed programs or projects. Using an eight measure rubric, decision-makers rate a proposed program or project on a scale of 0 to 5 within each criterion. See Figure 1 for the format of the rating scale.

Figure 1

1. Congruence with Institutional (Extension & University) Strategic Plans		
<p>This category examines whether the new program or project is aligned with relevant strategic plans. If Extension has a separate strategic plan from the university, then both should be addressed. Relevant factors to consider include whether the program or project targets an emerging issue and how many goals within a strategic plan are addressed. The scale ranges from a complete lack of connection to a significant connection to the strategic plan or mission:</p>		
0 equals..... <i>Unknown</i>	0	
1 equals..... <i>No connection to the strategic plan or mission</i>	1	
2 equals..... <i>Slight connection (e.g. fits the mission, but is not indicated on the strategic plan)</i>	2	
3 equals..... <i>Moderate connection to the strategic plan (e.g. an emerging issue)</i>	3	
4 equals..... <i>Good connection to the strategic plan (e.g. meets at least one goal)</i>	4	
5 equals..... <i>Significant connection to the strategic plan</i>	5	
<p>Reasons for rating:</p> <div style="border: 1px solid black; height: 30px; width: 100%;"></div>		

Here is an example of the first Objective Rating scale: Congruence with Institutional (Extension and University) Strategic Plans.

The Guide also affords decision-makers the ability to give priority to different criteria depending upon the context of the program or project. Using a scale of 3, 2, or 1, the criteria can be weighted according to level of importance based on project, program, office, or stakeholder requirements. The criterion that are the most important within the context of the program or project would be weighted with a 3, those of moderate importance would be weighted a 2, and those that are of the least importance would be weighted a 1. It should be noted that when using the weighting option, it is recommended that no more than four criteria receive a rating of 2 or 3. (See Figure 2 for the weighted scale.) Proposals that have an unweighted score of 24 (or a weighted average of at least 42) represent programs and projects that are more likely to yield positive outcomes and therefore are ones that may merit allocation of resources.

Figure 2

Weighted Scoring: If you wish to put a priority on the categories, you can use the following weighted scoring formulas. Assign the Weighted Score Categories (3, 2 or 1) in the green highlighted column, and the numbers you assigned above will automatically drop into the formula and show up in the blue highlighted column.

Weighted Score Categories:
3 = Most important criterion for program or project
2 = Moderately important criterion for program or project
1 = Least important criterion for program or project
(Note: No more than 4 total should receive a ranking of 3 or 2)

	Score (3,2,1)	Weighted Score
1. Congruence with Institutional (Extension & University) Strategic Plans		0
2. Alignment with Resources		0
3. External Funding Support (Community and Other Relevant Partners)		0
4. External Political Capital (Community and Other Relevant Partners)		0
5. Innovative Approach		0
6. Opportunity for Sustainability and/or Growth		0
7. Public Value Impact		0
8. Reputation Enhancement		0
Final Weighted Score		0

Note: When using weighted scores, projects should score at least 42 to be considered

Here is a snapshot of the Weighted Scale ranking section, all scores from the Objective Scales feed into this formula.

What are the Decision-Making Criteria?

The Guide identifies eight criteria to prioritize programs and projects. They are as follows:

1. *Congruence with Institutional (Extension & University) Strategic Plans*

This category examines whether the new program or project is aligned with relevant strategic plans. If Extension has a separate strategic plan from the university, then both should be addressed. Relevant factors to consider include whether the program or project targets an emerging issue and how many goals within a strategic plan are addressed.

The scale ranges from a complete lack of connection to a significant connection to the strategic plan or mission:

- a. No connection to the strategic plan or mission
- b. Slight connection (e.g. fits the mission, but is not indicated on the strategic plan)
- c. Moderate connection to the strategic plan (e.g. an emerging issue)
- d. Good connection to the strategic plan (e.g. meets at least one goal)
- e. Significant connection to the strategic plan

2. *Alignment with Resources*

This measure asks the question: When considering current non-financial resources, including staff skillset and workload, does the new program or project align?

Understanding whether current resources will be depleted, unaffected, or expanded can help determine how a new program or project will fit and what its impact may be on current or future capacity.

The scale ranges from not at all aligned to well-aligned with current resources:

- a. Not at all aligned with current resources (e.g. potential for negative impact on current staff, programming or clientele)
- b. Slightly aligned with current resources (e.g. aligned with only one aspect of existing resources)
- c. Somewhat aligned (e.g. aligned with several current resources)

- d. Aligned with current resources (e.g. compatible with current staff, programming, or clientele)
- e. Well aligned with current resources (e.g. provides opportunity to use current resources in a way that can expand programming or capacity)

3. *External Funding Support (Community and Other Relevant Partners)*

This category examines the impact on funding that could occur as a result of the program or project. Budgeting has always been an issue in which Extension has to contend, so the amount of external funding support that could be garnered should the program or project be chosen is critical.

The scale ranges from a situation in which costs will grow with no support to funding that exceeds expected program or project costs:

- a. Negative impact on funding (e.g. costs continue to grow with no outside support)
- b. No impact on funding (e.g. costs are “steady state” with no outside support)
- c. Moderate positive impact on funding (e.g. some substantial % of costs are covered by outside sources)
- d. Positive impact on funding (e.g. all costs, including overhead, are covered by outside sources)
- e. Significant positive impact on funding (e.g. revenue - or outside source contributions - exceed costs and therefore adds to the overall Extension budget or encourages new investments in similar or current projects)

4. *External Political Capital (Community and Other Relevant Partners)*

This category addresses the political capital that Extension programming has within the broader community. Because it is essential that Extension is perceived across the local community, county, and region in a positive manner, knowing the impact a new program or project will have on its political capital is an important consideration. Being cognizant of local strategic plans is one potential way of understanding how a program may be perceived, as is being aware of local stakeholder priorities; ones both stated and implicit.

The scale ranges from a loss of political capital to generating new political capital:

- a. Negatively impact political capital (e.g. may lose “political capital” with stakeholders)
- b. No impact on political capital (e.g. will not affect standing in community)
- c. Slight impact on political capital (e.g. advisory groups or other relevant players indicate a potential need/opportunity)
- d. Moderate impact on political capital (e.g. stakeholders, partners and constituents highly supportive; will enhance political capital)
- e. Major impact on political capital (e.g. will generate new political capital with primary stakeholders and/or establish new partners or audiences)

5. *Innovative Approach*

This criterion measures the level of innovation for the program or project, which puts Extension in the light of being a thought leader. Being innovative provides Extension with the potential to engage with a wider and/or more diverse audience and may include any of the following approaches: using new and emerging digital technology; creating an innovative partnership; deploying a new way to approach an old issue; and/or using new evidence based practices.

The scale ranges from using traditional methods to significantly innovative:

- a. Not at all innovative (e.g. a traditional program delivered in a traditional manner)
- b. Slightly innovative (e.g. engages with the same audience, but in a slightly different way or engages with a new audience in a traditional way)
- c. Moderately innovative (e.g. combines traditional programming or audience with a more unique methodology)
- d. Innovative (e.g. stretches established limits, resulting in new approaches for programming or audience)
- e. Significantly innovative (e.g. creates a new method to solve a problem or deliver a program or uses a fresh approach to engage with a novel audience)

6. *Opportunity for Sustainability and/or Growth*

This measure identifies the impact a program or project might have on resources.

Having the opportunity to start programs or projects that are sustainable in the long-term or ones that enable growth to occur will increase the value of Extension overall.

The scale ranges from greatly decreasing resources to greatly increasing:

- a. Greatly decreases resources (e.g. depletes current resources and staff time)
- b. Slightly decreases resources (e.g. current staff can likely absorb the additional work)
- c. Has a neutral impact on resources (e.g. does not add / or detract from current capacity)
- d. Slightly increases resources (e.g. increases opportunities for additional resources and/or staff)
- e. Greatly increases resources (e.g. creates a sustainable, ongoing opportunity or allows for growth)

7. *Public Value Impact*

A measure of public value impact, this criterion examines the level of contribution to the common good a program or project has the potential to have (Kalambokidis, 2004).

Ensuring that Extension programming contributes in a meaningful and equitable way to the public is a valuable piece of maintaining good relationships with the community at-large.

This scale ranges from a lack of contribution to gaining public value impact beyond the local area:

- a. Does not contribute to the common good
- b. Slightly contributes to the common good (e.g. impact on a small group of people)
- c. Moderately contributes to the common good (e.g. impact on a community)
- d. Positively contributes to the common good (e.g. impact on a county or region)
- e. Contributes a great deal to the common good (e.g. impact beyond the area)

8. Reputation Enhancement

This criterion assesses the impact the potential program or project will have on Extension's reputation within the broader community. Given the role Extension plays within the broader community, understanding potential change to the local, regional, state program goals and/or resources is an important aspect to consider.

This scale ranges from a negative impact to a significant impact on Extension's standing:

- a. Negative impact on Extension's standing
- b. No impact on Extension's standing (e.g. no apparent change to local, regional, state program goals and/or resources)
- c. Moderate impact on Extension's standing (e.g. potential to expand local, regional, state program goals and/or resources)

- d. Positive impact on Extension's standing (e.g. identifies direction to expand local, regional, state program goals and/or resources)
- e. Significant impact on Extension's standing (e.g. expands ability to meet local, regional, state program goals and/or resources)

Discussion and Conclusion

This tool can be a valuable way for a decision-maker, a team, and Extension partners to confidently clarify a program or project decision.

Here are two scenarios where the *Making an Informed Decision Guide* has been used by county directors:

"I laminated it and use it when meeting with clients to determine new projects for grants, community development opportunities, considering partnerships with other Extension offices, and when looking at workshops or programming opportunities. Once I'm done, I total everything up and wipe it off for the next meeting."

"I was getting pressure from administration to get involved in a multi-state project that I deemed unproductive for my county work. I took the time to completely fill out this index and asked the most recently retired county director to do the same. I believed I was emotionally reacting to the pressure from my supervisor and wanted someone who knew the institution, and

the parameters of my job. We both scored the project with a very similar, negative outcome. I was able to articulate to my administration about why I chose not to get involved.”

The Guide is, most importantly, a framework for engaging a community in rich conversation and more positive project outcomes.

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