

# CHAPTER 20

## Professional Development for Extension Staff

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### Introduction

Training and onboarding programs must strategically align with best practices in adult learning and be regularly monitored and assessed. Extension is an educational organization that offers educational programming to adults in communities. Therefore, Extension must commit to offering excellent training to their own employees if those employees are expected to design and deliver high-quality educational programs within communities they serve.

A strong onboarding experience leads to higher job satisfaction and organizational commitment, lower turnover, higher performance levels, career effectiveness, and less stress on new employees (Bauer, 2011). Excellent training contributes to productive, thriving employees. Thriving employees are happier in their work, more committed to their organization, and higher performers. Research investigating factors that contribute to individual and organizational excellence has found employees who thrived were characterized by two components: (1) a sense of vitality and (2) constant learning (Spreitzer & Porath, 2012). While training needs to span all employees at all career stages, extension organizations need to pay special attention to onboarding new staff, since this sets the tone for employee satisfaction and workplace culture.

### Onboarding Overview

Onboarding is not a single event. It is a strategic plan of varied activities that are meant to integrate new hires into the organization, with the goal of providing them with the skills, knowledge, and cultural understanding needed to productively fulfill their job responsibilities. This can include traditional training, self-study and self-access materials, group orientations, mentoring programs, and even job aids and documents relating to policy and procedures.

The Four C's model of onboarding (Bauer, 2011) is a useful framework for creating robust onboarding and support systems, and one which Michigan State University (MSU) Extension has used to guide a comprehensive onboarding structure. The four components include Compliance, Clarification, Culture, and Connection.

**Compliance** focuses on institutional policy, rules, and regulations. This dimension is common in even the most basic of employee onboarding models, appearing in employee handbooks and other written policy. While compliance may appear to be black or white, new employees need help in contextualizing policy and rules; onboarding should not stop at simply asking an employee to read an organizational handbook. An example of how MSU Extension has done this would be using learning scenarios to illustrate what choices one should make when traveling or expense reporting to abide by travel policy and rules. The use of scenarios in adult learning capitalizes on the problem-solving orientation of adults, which is a key tenant in *andragogy* (Knowles et al., 2010), or adult learning theory.

The second component, **Clarification**, focuses on the understanding of one's role, responsibilities, and expectations. A 2014 study by Bamboo HR revealed that one in six new hires leave in the first three months, and of these, 23 reported that "receiving clear guidelines to what my responsibilities were" (Maurer, 2015, First Impressions Matter section) would have increased the likelihood of staying. Clarification requires messaging tailored for each position by supervisors, as it may differ from position to position. This need to personalize the content is extremely relevant at MSU Extension; educators specialize in specific content areas and serve defined geographic regions as small as a county and as broad as statewide. Thus, their work realities vary hugely despite a shared title. This requires training supervisors on the topic. Employee managers and leaders must realize the importance of clearly setting expectations and defining roles, and regularly circle back to these discussions as priorities and responsibilities evolve over time.

**Culture** focuses on understanding formal and informal organizational norms. The formal aspect of this dimension includes understanding an organization's mission, goals, values, and history. These elements are often well-documented, and thus easier to include. Equally important within this dimension, though, would be informal and undocumented aspects of organizational culture and expectations, which can vary from unit to unit. This may address norms for scheduling meetings, expectations regarding responsiveness to emails, preferred modes of communication, and the preferred way to get things done in accordance to common but undocumented ways of working. Due to their fluidity, such informal aspects are best achieved through building relationships and peer support. Mentoring programs effectively address this dimension.

The dimension of **Connection** focuses on relationships to help new staff adapt and flourish. Employees lacking engagement, whether they are high or low performers, quit more often; and performance does not predict engagement (Wigert, 2018). Forming connections gives new employees access to valuable insider perspective on informal work culture and contributes to a sense of belonging and engagement. This can be achieved by inclusion on projects and meetings, mentoring, and team-building events.

# Michigan State University

## Extension Onboarding

All new staff, from secretaries to educators to district directors, engage in an onboarding process that is led by the learning and talent development specialist and the human resources team.

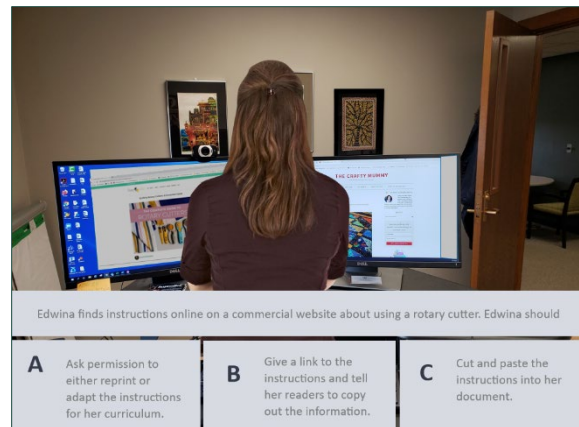
Onboarding begins as soon as the new employee signs the offer letter. Supervisors receive a new hire checklist of tasks to complete to ensure the employee has the information and resources required to start the new job. This reduces anxiety of new staff, sets the tone for a warm welcome, and provides opportunities for new staff to make connections and begin to gain knowledge in the area of compliance. Supervisors receive a modifiable agenda template for their first expectations-setting meeting with the new staff as well as a modifiable training plan that includes required and optional training activities for their first year. These supervisor tools ensure that all new employees are clear about their roles, responsibilities, and expectations.

New staff complete two self-paced online onboarding courses. The first course addresses formal organizational culture such as the history, mission, and structure. It also introduces an array of resources with links so new staff can dive back into topics and learn more when ready. The second course contains a collection of modules on topics that are relevant across job positions, such as civil rights expectations and administrative skills of expense reporting and time management.

The online, self-paced, asynchronous format of these courses aligns well to both the logistical needs of Extension employees, who are geographically spread across Michigan, and to best practices in adult learning. Adult learners need to feel self-directed and be seen by others as such. They want to take responsibility for their own learning and feel like it is a choice (Knowles et al., 2010). The self-paced format of these courses allows for this and provides learners with readily accessible documentation on various areas that they can easily circle back to for review or reference.

Online learning modules make use of Extension-specific scenarios (see Figure 20-1). Adults typically become ready to learn when they experience a need to cope with a real-life situation or perform a task (Knowles et al., 2010). These scenarios help learners to contextualize theoretical information into their own professional world of Extension, and can easily be incorporated into both face-to-face and online learning modules, such as the excerpt from an online module shown in Figure 20-1. The grounding of the materials in Extension-specific scenarios also motivates learners, as the link between their reality and the content is obvious.

**Figure 20-1. Example scenario from the MSU Extension online training course “Preparing to Submit Your Educational Project to an Editor.”**



The format and length of these onboarding course materials were informed by a 2017 needs analysis ( $n = 220$ ) that revealed the preferred length of training to be 20 to 45 minutes. Thus, course material was chunked into thematic modules ranging in length from 20 to 30 minutes. Online course badges for individual modules and a certificate of completion for each course provides motivation and allows for accountability as certificates can be requested by supervisors to document completion of the materials.

Whereas these online resources focus on compliance, formal work culture, and the providing of connections to online and other resources, a face-to-face element is necessary to help new staff to build relationships and learn how their individual roles fit into the larger mission of the organization. To achieve that, a two-day, face-to-face orientation is required of all new employees. These orientations take place four times a year on the MSU campus and require overnight travel for most attendees.

The orientation focuses on understanding the organization, building relationships, and making connections. Attendees meet with members of leadership and key support staff and learn about the mission, vision, values, and history of the organization along with diverse types of programming provided. All employees attend the same orientation, from administrative support staff to educators to directors, so it does not cover the specifics of how to perform one's job. While the orientation does have elements stressing organizational identity, MSU Extension tries to balance this content with content that celebrates the new employees' strengths. The organization takes this approach because when onboarding focuses on individual identity instead of on organizational enculturation and identity, there is less turnover and higher levels of engagement and job satisfaction (Cable et al., 2013). Thus, MSU Extension incorporates activities that have participants identify their strengths and passions at work and recognize how their unique skillset can contribute to the success of the unit. Staff attend a session on diversity training, and the message that diversity results in strength is reinforced.

# Mentoring

Mentoring helps the new employee strategize in work-life balance, manage stress, understand organizational values, and identify as an important part of the organization (Payne & Huffman, 2005). Having a mentor helps employees form supportive relationships and keeps employees from feeling that their work lacks meaning (Bailey & Madden, 2016). In the context of Extension, mentoring can result in increased job satisfaction (Bowen et al., 1994) and result in improved program planning and implementation (Kutilek & Earnest, 2001). At MSU Extension, each institute has a mentor coordinator who makes and monitors mentoring matches. Mentors are selected from employees who are positive, well-connected, experienced, and willing and able to invest an appropriate amount of time. Mentoring is a choice, not a requirement. Both mentors and mentees complete information forms so that appropriate matches can be made based on shared areas of interest, preferred communication modes, geographic location, and personality. The learning and talent development specialist oversees the program. She works with the coordinators, maintains a mentoring handbook, and provides training and guidance for new mentors. Surveys to both mentors and mentees at 2, 6, and 12 months into the mentoring relationship serve to keep coordinators informed on the progress of the mentorship. Survey responses reveal when a relationship may not be working, if additional support or resources are needed, and what perceived benefits are resulting from the relationship.

## Frameworks for Professional Development: Core Competencies & the T-Shaped Professional

In Extension contexts, the term *competency* has been broadly defined to include “the application of knowledge, technical skills and personal characteristics leading to outstanding performance” (Boltes & Bieber, 1997, p. 35), or the “knowledge, skills of abilities required of a job” (Cooper & Graham, 2001, p. 39). Given the broadness of these definitions, one can imagine the difficulty of using competencies as a framework for professional development that spans positions. Thus, MSU Extension has focused on core competencies, which is defined more specifically to be broad and inclusive skills, which span positions and provide a scaffolding for how employees can succeed at work. Core competencies are not position specific. “They relate to our organizational values and create a link between what we believe and how we behave” (Baker, n.d.).

At MSU Extension, our core competencies span disciplines and positions to provide a structure for goal-setting, professional development, and performance management. These competences, revised in 2019, are listed in Table 20-1.

**Table 20-1. MSU Extension Core Competencies.**

Competency	Description
Physical and fiscal resources	Mindful of individual and shared workspaces and resources. Exhibits good stewardship of physical and financial resources (e.g., storage, supplies, budgets, financial records, and reporting).
Teamwork and leadership	Thoughtfully engages in working with others throughout the organization to plan and accomplish the organizational mission and promote shared values. Positively influences groups and individuals. Establishes and supports teams such as advisory boards, committees, councils, etc. (e.g., coaching, mentoring, creating a vision, implementing action plans).
Partnerships and collaborations	Is aware of issues and variables vital to the community being served, and understands how these variables impact program prioritization, planning, and delivery. Continuously seeks opportunities and builds strategic partnerships to leverage and build support for programming to reach organizational goals and serve communities according to their needs (e.g., communicates with media, communicates Extension's value to partners, awareness of community).
Program development, evaluation, and reporting	Supports the development and delivery of programs including the collection of appropriate data to measure impacts. Understands the need to communicate programming outcomes to stakeholders and continuously improve programming content and marketing through evaluation (e.g., needs assessment, marketing, program evaluation).
Educational delivery and technology adoption	Delivers content in formal and informal educational contexts using appropriate strategies and methods based on the target audience. Stays current with innovations in educational technology and adopts these technologies as appropriate, using modern theories in teaching and learning (e.g., being an early adopter or tester of innovative tools).
Diversity, equity, and inclusion	Leads and supports efforts to advance a diverse, equitable, and inclusive community and workplace consistent with Extension's core values. Builds awareness (of self and others across differences) and prioritizes diverse relationships, networks, and collaborations to build and include all Michigan's population across program planning, delivery, and evaluation. Open to understanding historical and current barriers that impact constituents and colleagues lives at the personal, interpersonal, institutional, and cultural levels. Consistently upholds the highest standards of equity and inclusion in programs.
Interpersonal and organizational professionalism	Displays positive interpersonal skills and has self-awareness in being accountable, responsible. Recognizes areas for self-improvement and pursues professional development for continuous learning. Aligns actions to the mission and goals of Extension (e.g., professional in communications, follows through on initiatives and meets deadlines, puts thought into appropriate professional development, makes an effort to keep skills updated).

Having a shared set of understandings and skills spanning disciplines and positions enables staff from various programmatic areas or disciplines to function well as teammates and colleagues. It cannot be denied, however, that each position also demands job-specific skills and knowledge beyond these competencies. These content-based skills and knowledge are also sometimes referred to as “technical” competencies. Thus, we have wed the concept of core and technical competencies with the T-shaped model of professional development.

The T-shaped model of professional development encompasses both core competencies that span disciplines and disciplinary-specific skills and competencies.

The T-professional, often illustrated as a large block T, integrates depth, defined in terms of disciplinary knowledge and the ability to understand how individuals with that knowledge function and interact to accomplish a desired outcome within or across a system(s), and breadth, defined as the professional abilities that allow someone with profound disciplinary knowledge to interact meaningfully with others who possess different disciplinary knowledge in order to affect an outcome that might not otherwise be possible. (Gardner & Estry, 2017, p. 1)

This concept of a T-shaped professional model emerged from industry in the 1990s as a way to conceptualize the type of talent companies were looking for in their employees. MSU recognized the value of the model as a useful framework to articulate a planned way of graduating students trained in the liberal arts who would possess both the expertise in their own discipline and the skills needed to work across disciplines. From there, the university also adopted the model to frame university employees’ professional development.

The core competencies that cut across multiple positions within an organization are crucial in developing employees who are able to work across disciplinary boundaries to contribute to projects and solutions, and see challenges and issues faced in different disciplines and systems. A review of essential competencies needed by extension professionals by Argabright et al. (2019) shows that the competencies most frequently deemed as crucial in extension have historically been “program development and evaluation, research expertise, and a fundamental knowledge of Extension.” However, they argue, we must go beyond these traditional topics in developing Extension professionals to face increasingly complex challenges. Skills needed to face these challenges include many “soft” skills such as effective teamwork and relationship building, which allow individuals with various talents to come together and form diverse teams capable of solving these problems. In addition, Extension needs to develop leaders who excel in communication and other soft skills so that new talent is retained and supported (Seger & Hill, 2016). This is not a new idea; a 2010 Delphi panel of national experts in Extension resulted in two main groupings of competencies, one relating to the program development process and the larger grouping composed of core interpersonal skills (Harder et al., 2010) that could all fit onto the “top” of the T (see Figure 20-2) and easily apply to professionals in many disciplines.

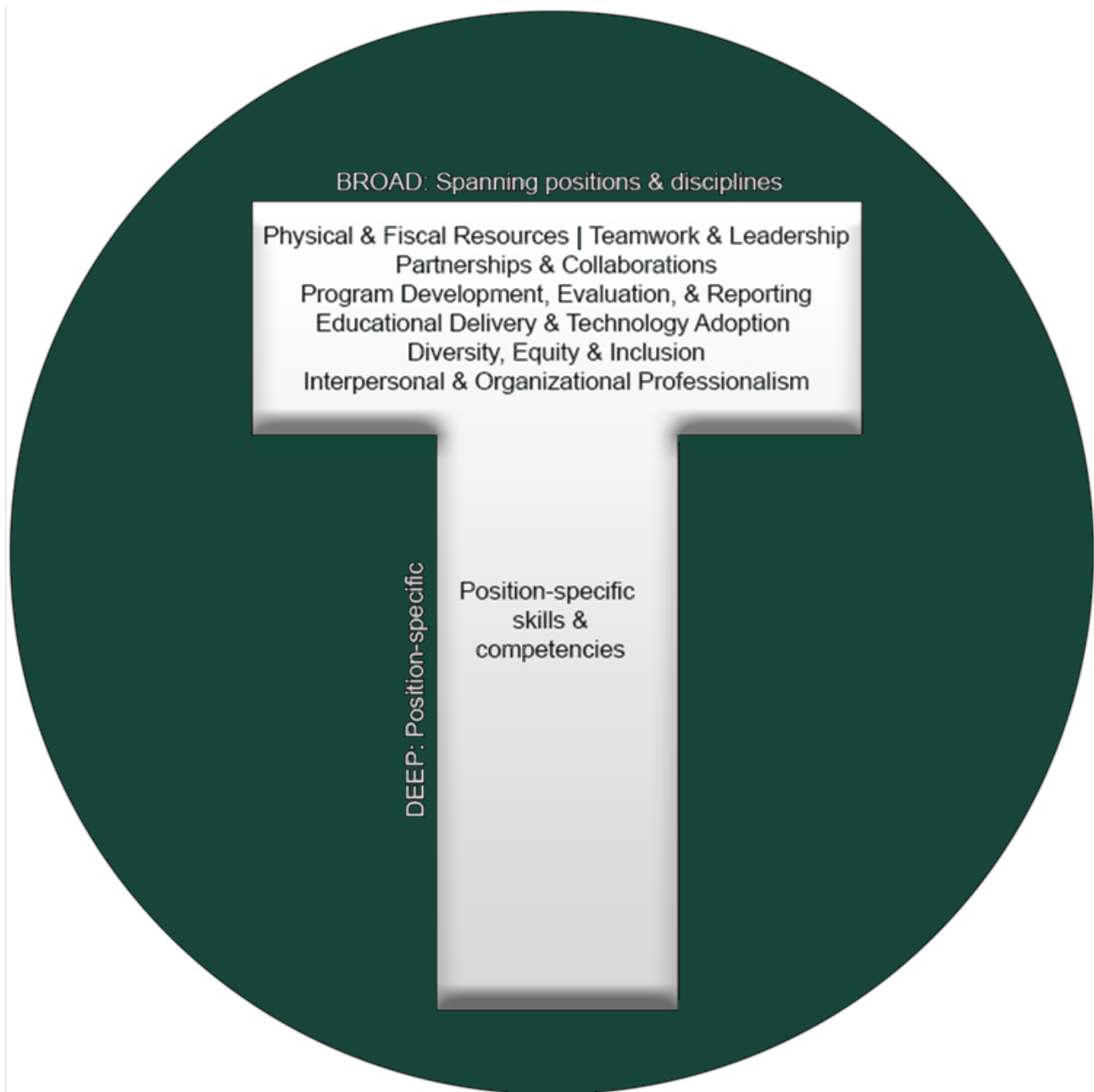
The seven MSU Extension core competencies focus on the top bar of the “T” in the T-shaped professional model (see Figure 20-2). Some of these

competencies reflect the nature of our organization; we exist to serve communities through evidence-informed educational programming. For this reason, the following competencies are included in the top bar of the T:

- Partnerships and Collaborations
- Program Development, Evaluation, and Reporting
- Educational Delivery and Technology Adoption

For example, not all positions at MSU Extension directly develop programs. Yet all extension employees must have a broad understanding of what happens in program development, evaluation, and reporting, as it is the crux of what we do.

**Figure 20-2. T-shaped learning model used to frame core competency and position-specific competencies for MSU Extension employees.**





If we wish our employees to take their responsibilities to educate and inform communities through evidence-based programming seriously, we must be deliberate in our approach to onboarding, training, and development. Aligning your training delivery to best practices and developing a framework for determining content are the first steps in this process.

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