

## **Outreach and Engagement Strategy Implementation Team December 12, 2012 Report**

### **BACKGROUND**

The goal of the Outreach and Engagement Strategy Implementation Team was to “ensure that each campus defines its outreach and engagement model, activities and outcomes and coordinate reporting of outcomes...”

Members of this implementation team included Ken Brown (UTHSC), Tommy Cates (UTM), Deborah Arfken (UTC), Elizabeth Burman (UTK), Tim Cross (UTIA) and Mary Jinks (UTIPS).

The IT Community of Practice on Outreach and Engagement began work this summer defining data elements, so these two groups met jointly to continue this work. Members of the CoP included Allen Dupont (UTHSC), Karen Adsit and Ginny Reese (UTC), Emily Tipton and Robert Burns (UTIA), Dennis Hengstler and Bob Campbell (UTSA) and Paul Jennings and Jim Thomas (UTIPS). In addition, we were joined by Peg Hartig (UTSHC), Chuck Shoopman (UTIPS) and Ellie Amador (UTSA). Ken Brown, Tommy Cates and Elizabeth Burman were assigned to both groups.

The committee met five times in June, July, September, October and November. We have a meeting summary available from each meeting and all our work is posted on a SharePoint site. Four meetings were held via video conference and one meeting was face-to-face in Nashville.

### **PROGRESS TO DATE**

1. We wrote a set of Guiding Principles to direct our work (See Attachment 1)
2. We wrote a definition of Outreach and Engagement (See Attachment 2)
3. We developed a common list of data elements that should be collected at every campus and institute and wrote a definition for each (See Attachment 2)
4. We began developing an Outreach and Engagement Model for each campus and institute. They are in various stages of development as reported below:

- a. UTC – Although these activities are decentralized between Academic Affairs and Student Development and there is no overall model, the UTC strategic plan task force purchased the Sugar customer relationship manager software (Sugar CRM) this fall to record all partnership activities. During the spring semester, this task force will complete an inventory of all current partnerships.
- b. UTK – has a new vice chancellor for research and engagement, Taylor Eighmy. He is conducting listening sessions. Should have a model in January.
- c. UTM – expecting a big turnover in deans for next fall. It will likely be fall 2013 before a model is finalized.
- d. HSC – Peg Hartig is the new assistant vice chancellor for community engagement. She will begin working on a model.
- e. Ag – extension has a model and they will work to develop an overall model for the entire institute.
- f. IPS – has a draft model that will be reviewed with the leadership team in December. Will finalize the model in early winter.

## **FURTHER RECOMMENDATIONS**

There are a number of activities that the committee believes may be important to collect and report for purposes of the strategic plan. However, this committee recommends further consideration be given to these items as to the value and purpose of the data as well as the difficulty of the data collection efforts.

**Economic Impact** – We believe this data element is important, however, we recommend it be reported in another goal. It is not exclusively related to Outreach and Engagement.

- Operational Impact reflects the value of the University’s payroll, procurement and operating presence throughout the state. These values are calculated using widely accepted econometrical models based on actual University fiscal results.
- The number of faculty, staff, and students employed by the University in either a full-time or part-time basis during a reporting period.

**Volunteer Activities** – We believe this potentially could serve a valuable purpose, but may be too difficult to collect. We also recommend consideration be given to volunteer activities conducted by UT faculty and staff in the community as part of their personal time.

- Number of volunteers (UT faculty/staff and Others reported separately)
- Amount of volunteer hours

**Student Activities** – We believe this information is valuable, but recognize there is no easy way to collect the data. Additional discussion is necessary to determine the correct approach.

The University of Tennessee engages students in a wide variety of activities through academic, social and philanthropic programs.

- Number of Students (or %)
- Amount of hours

**Faculty Engaged Scholarship** – In addition to projects, activities, and non-credit programming, we believe information about the other products of engaged scholarship is valuable, but recognize there is no easy way to collect the data. Additional discussion is necessary to determine the correct approach.

**Other considerations** –

- The committee believes that anecdotal stories are also an important component of sharing our story and some consideration needs to be given to how we could collect these stories for reporting.
- The committee further recommends consideration be given to determining the value of our outreach efforts beyond simply calculating the quantity of what we do. How do we know we are effectively achieving our goals?

## **NEXT STEPS**

- The senior leadership team must approve or edit the definition of outreach and engagement, the list of data elements and the definition of each data element.
- The campuses and institutes must develop a method to begin collecting and reporting these data. This will require IT resources to include the purchase of a software package(s) or the development of an application. Either solution should provide an easy-to-use system that encourages participation from all faculty and staff.
- Each campus/institute must finalize its Outreach and Engagement Model and clearly communicate it throughout the community.

**Attachment 1**  
**Outreach and Engagement Community of Practice**  
**Guiding Principles**  
**October 9, 2012**

To ensure data integrity with outreach and engagement information reported to the system level, the following principles will be followed:

1. Data that are collected should have defined purpose, value and usefulness.
2. Data should reflect and support how outreach and engagement are commonly understood, recognized and rewarded.
3. There should be agreement on data elements, definitions, and processes.
4. Agreed upon data elements should be entered only once at the campus/institute as the single authoritative source that can be aggregate at the system level.
5. There should be recognition of the technical constraints of systems and the need for cost-effectiveness.
6. Training and technical support should be sufficient to support systems and data applications.
7. There should be a strong emphasis on data accuracy at the campus/institute level.
8. Each campus/institute will have a single point of contact for data reporting to the system.

Accurate reporting of these data will help more clearly demonstrate the role of the UT System in community outreach and engagement across the State of Tennessee.

**Attachment 2**  
**Outreach and Engagement**  
**Dashboard Measures**  
**12/03/2012**

**Outreach and Engagement**

UT outreach and engagement delivers the missions of teaching, research, and service into the communities of Tennessee and beyond by establishing reciprocal partnerships, exchanging mutually beneficial knowledge and resources, and providing evidence-based solutions.

Outreach and engagement is operationally expressed through a variety of projects, activities, programs, presentations, demonstrations, public performances, cultural events, camps and group meetings. Outreach and engagement is characterized by personal and direct impact on clients, customers and citizens and must be measurable to be reported.

**Projects and Activities**

University of Tennessee faculty and staff engage in a wide variety of projects and activities across the State of Tennessee. Projects and activities reflect the range of clients/customers and patients directly served across the state and may be provided for a fee. They do not include t.v., radio, billboards, websites and other media that indirectly reaches citizens, nor does it include athletic events.

- Number of clients/customers served off campus– the number of clients/customers contacted directly by UT faculty and staff for outreach and engagement purposes through site visits, direct mail, phone calls, email, group meetings, demonstrations, and visits at homes, workplaces and farms. (Programs with an attendance roster are reported under non-credit programming.)
- Number of clients/customers served on campus– the number of clients/customers served directly by UT faculty and staff for outreach and engagement purposes through public performances, cultural events, summer camps, group meetings, and demonstrations.
- Number of patients served – the number of patient visits with a UT healthcare professional (includes physicians, nurses, vet med, social work, audiology, psychology, etc.)

### **Economic Outcomes**

The University of Tennessee contributes positive economic impacts to the state, region, nation and world through its teaching, discovery, and outreach activities. Economic outcomes reflect value provided to University clients/customers and the resulting jobs that are created or retained.

- Customer-reported Economic benefit reflects the value of increased sales, increased revenues, reduced costs, and capital investments by clients/customers of the University of Tennessee generated based on client/customer interactions with University faculty and staff. Sales records, observations, interviews, and surveys are used to describe clients' increased savings, increased revenue, and one-time capital purchases. Expert estimations and established research is used to describe one-time, non-recurring economic values.
- A calculation of the number of jobs impacted by assistance reported as client/customer-reported economic benefit using a U.S. Department of Defense, Defense Logistics Agency standard methodology.

### **Non-credit programming**

The University of Tennessee provides a wide variety of non-credit programs to citizens of the State of Tennessee. These programs are structured learning activities with curricula that may lead to a credential such as a CEU, CME, CLE, etc. These programs may be provided for a fee. All programs include a roster of individual participants (programs without a roster are reported under projects and activities).

- Number of non-credit educational programs, group meetings and demonstrations offered for external audiences.
- Number participants in non-credit educational programs, group meetings and demonstrations offered for external audiences.
- Number of hours associated with non-credit educational programs, group meetings and demonstrations offered for external audiences.
- Number of credential units (CEUs, CMEs, CLEs, etc.) awarded.

### **Recommended Data Format**

- By the fiscal year (beginning with Fiscal 2012)
- By county (beginning as soon as feasible)

**Versions:**

First Draft 9/17/12

Second Draft 11/2/12

Third Draft 11/16/12

Fourth Draft 11/30/2012