In 2010, Tennessee Extension launched a strategic planning process to honor the past and look to the future. The strategic plan provided a roadmap to guide Extension to achieve excellence and focus attention on what matters most: advancing Extension in Tennessee. The plan resulted in five overarching goals that included strategies and action steps to achieve each goal. One strategy was to develop a world-class Extension team of staff and volunteers, with an action step to establish a competency-based system to guide professional development and provide a framework for other personnel actions.

**Background**

Over the last 100 years, Tennessee Extension has helped Tennesseans solve problems and implement changing technologies to improve the quality of life throughout the state. As the landscape for Extension in Tennessee and across the nation continues to evolve, programming has become more complex with a broadened emphasis to meet emerging needs that challenge communities. This evolution is further complicated by the accelerated rate of change and the adaptation of advancing technology. These changes necessitate the need to hire, train and retain a workforce that successfully meets these challenges and the needs of their communities. Going forward, Extension will need to examine these questions: What educational background will future Extension educators need to be successful? How can Extension as an organization ensure that educators are equipped to meet the challenges faced daily? What are the implications for Extension?

The answer to these questions may only be determined by a backward glance from the future. However, to foster success, Extension chose to invest in the process to help prepare our current and future Extension educators to be successful as they work in communities with clients and partners to develop curriculum, to solve problems, and to communicate effectively.

**Purpose and Objectives**

In 2014, a diverse team of Extension professionals was appointed and charged with developing a competency-based system to guide professional development. The team’s ultimate purpose was to expand and strengthen Extension’s workforce, thereby increasing Extension’s public value.
Establishing a Competency-Based System for Professional Development

Specific objectives included:

- Identify soft skill competencies needed for entry-level agents to be successful.
- Assess new employees’ soft skill competencies in order to provide new employees customized professional development.
- Use the competency assessment as a basis for targeted professional development.

Methodology

The work on competencies for agents was achieved through several methods. Members of an initiative team were nominated by their supervisors. Team members were selected to represent the diversity of Extension including all program areas, each region of the state, varying years of experience, and different job classifications.

As a first step, team members conducted an environmental scan and review of competency work conducted by other Extension programs. Based on this work, the team provided input about core competencies needed for Extension professionals to be successful in Tennessee.

Once an initial list of core competencies was developed, a modified Delphi survey was conducted with county directors and county agents. County agents and directors were nominated by regional program leaders. Nominees were selected to participate across the three regions and the three program areas. The Delphi Technique uses a series of questionnaires to generate ideas from a nominated group of experts. Participants completed three rounds of surveys to provide feedback about the list of competencies and related training needs.

The competencies were then used to develop a scenario-based assessment. An expert panel was formed that included administrators and initiative team members.

This expert panel collaborated with an online learning assessment company with experience developing scenario-based online learning modules and assessments for professionals. After each assessment was developed, the company and the expert panel would review the questions to review alignment and relevancy for Extension professionals. Initiative team members also reviewed each assessment and provided feedback.

Once the assessments were reviewed and completed, a pilot study was conducted with agents who had been hired within the past five years. Agents were asked to complete the assessment and provide feedback about technical issues, readability, and perceived value and relevancy for new agents. This feedback was used to revise the assessments.

Major Outcomes

The competency-based program that was created is called EXCELS (Extension Competency E-Learning for Success). EXCELS outlines a process for

Competencies

A list of 73 competencies in seven areas were identified. The competency areas are:

1. Communication/Interpersonal Skills
2. Professionalism
3. Leadership
4. Educational Design
5. Organization Systems
6. Partnerships
7. Volunteerism

Online Assessments

Seven scenario-based online assessments were developed with input from an expert panel that included administrators and members from the competency committee.
Establishing a Competency-Based System for Professional Development

The assessments are administered online through the online learning management system, K@TE.

**Online Training**
Using the University’s online learning management system, a collection of e-courses and online resources was developed. E-courses, some internally developed and most contracted from outside vendors, range in length from 30 minutes to three hours, and completion earns professional development credit. Depending on the assessment score, a certain number of training hours in specific courses are recommended.

**Handbooks**
Two handbooks were developed: one for agents and one for regional program leaders. A handbook for agents includes an introduction to the competency areas, the individual competencies, and the assessment process and timeline. A handbook for regional program leaders includes a timeline, expectations, and a list of recommended e-courses that correspond to the assessed competencies.

**Sustainability Plan**
Responsibility for sustaining the EXCELS program resides in the Department of Extension Evaluation and Staff Development. EXCELS is a requirement of all newly hired Extension agents. Agents are introduced to the assessments at New Agent Orientation and take the assessments on a staggered timeline over the six months following their attendance at orientation. The assessment identifies the competency area where additional training is needed, and the regional program leader works with each individual to determine which individual competencies are most relevant for the employee’s professional development. This interactive process serves as a way to validate each individual’s assessment results. The regional program leader, in coordination with the agent’s county director, assigns e-courses and provides additional suggestions for appropriate professional development that the agent will complete over a period of six months to increase competency in deficient areas.
Establishing a Competency-Based System for Professional Development

Initiative Team

Leadership
2017-2018
Shirley Hastings, Director, Strategic Planning
Brandi Berven, Extension Specialist, Extension Evaluation and Staff Development
2014-2016
Tomi Rogers, Extension Specialist, Extension Evaluation and Staff Development

Team Members
Mitch Beaty, Area 4-H Specialist, Eastern Region
Ann Berry, Professor, Family and Consumer Sciences
Karen Franck, Assistant Professor, Family and Consumer Sciences
Matt Horsman, County Director, Williamson County
Rita Jackson, Extension Specialist, Family and Consumer Sciences
Cristina Martinez, IT Administrator, Central Region
Milton Orr, County Director, Greene County
Elizabeth Renfro, Extension Agent, Washington County
Tom Samples, Professor, Plant Samples
Daniel Sarver, Extension Specialist, 4-H Youth Development
Jim Stewart, Regional Director, Central Region
Ron Tredway, Executive Director, Employee and Organizational Development