Introduction
The Office of Outreach and Engagement will lead and model exemplary outreach and engagement, to bring forth new and strengthen existing collaborations resulting in meaningful economic, social, educational and environmental impacts to fulfill N.C. State University's land-grant mission. This Office was formed on an interim basis in 2012 to determine whether a dedicated office in support of the O&E function at N.C. State could be used (and how) to develop, strengthen and promote the O&E mission and related activities across the university, community, state and beyond. The results of that first year made clear the overwhelming support for an office dedicated to supporting the “engagement network” (those individuals across this University involved in outreach and engagement who rely on this Office to provide leadership and support) and their work.

With the formal establishment of this Office of Outreach and Engagement, the strategic planning process was undertaken to determine how to maintain progress in supporting this engagement network in the ways that remain important while establishing new methods of support. Much of the work over the next three years will set up the Office with the necessary tools, infrastructure and processes necessary to conduct business in an operationally efficient manner, which will accommodate budgetary restraints.

A primary focus and role for the Office is to identify, develop and encourage strategic partnerships. Relationships with the engagement network will support our integrated approach to external partners in key sectors across our local and global communities.

We will continue to apply the iterative Plan-Do-Study-Act cycle\(^1\) to guide our operations and evaluate opportunities. Using this planning cycle in the Office’s inaugural year has proven to be a successful way to test out new opportunities for outreach and engagement while minimizing resource investments. The results of this approach, including the small-scale tests of promising proposals, will inform the Office’s planned goals, objectives and actions.

Mission, Vision and Guiding Principles

Mission

\(^1\) Developed by W. Edwards Deming. Dr. Deming called the PDSA cycle the "Shewhart Cycle for Learning and Improvement." See The New Economics for Industry, Government, Education.
To fulfill N.C. State University's land-grant mission, the Office of Outreach and Engagement will lead and model exemplary outreach and engagement, to bring forth new and strengthen existing collaborations resulting in meaningful economic, social, educational and environmental impacts.

**Vision**

Be the innovative and relevant model of outreach and engagement that is locally responsive and globally engaged.

**Guiding Principles**

Additionally, the office will operate under the following guiding principles:

<table>
<thead>
<tr>
<th>INNOVATION</th>
<th>We generate unique and adaptive solutions based on outreach and engagement with partners.</th>
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<tr>
<td>RESPONSIVENESS</td>
<td>We address relevant issues that have a profound positive impact in North Carolina and beyond.</td>
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<tr>
<td>EMPOWERMENT</td>
<td>We empower people to make plans and decisions as we work together to enrich their lives, families, organizations and communities.</td>
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<tr>
<td>PARTNERSHIP</td>
<td>We transcend boundaries and value local, global, and campus partners for the unique contributions each makes toward addresses the grand challenges of society.</td>
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<tr>
<td>SCHOLARSHIP</td>
<td>We actuate trans-disciplinary scholarship that brings together university and community partners to create or improve knowledge, outcomes and impacts.</td>
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<td>EXCELLENCE</td>
<td>We model, promote and celebrate exemplary outreach and engagement.</td>
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**Strategic Planning Process**

The current cycle of planning began in April, 2013 when Interim Vice Provost for Outreach and Engagement Dr. Terri Helmlinger Ratcliff formed a twenty five-member planning team to identify the key priorities, goals and objectives for the new Office of Outreach and Engagement at N.C. State University. The team was comprised of University members who represented the engagement network as well as a facilitator, Dan Parks, who promoted the process. Two team members, Dan Parks and Tina Bennefield, manage a variety of enterprises in their strategic planning efforts.
Planning team members also held conversations with additional members of the engagement network who helped inform and guide this initial planning cycle. These conversations as well as the findings from the Office’s interim year (2012-13) informed the process and resulting plan.

A main finding coming out of this Office’s interim year is consensus for its principal aim being to support the broad and deep spectrum of engagement and outreach activities at work throughout the campus and community. Having planning team members who represented the various engagement and outreach units across campus ensured that their respective needs were incorporated and prioritized in the resulting strategic plan.

The team's initial task was to develop the Office’s vision, mission and guiding principles, as well as the plan’s primary goals. At the conclusion of this work, team members formed functionally aligned subgroups (by goal) to develop the objectives and strategies. This 2013-2016 Strategic Plan for the Office of Outreach and Engagement at N.C. State University reflects the work and agreement of this planning team.

**Strategic Planning Team**

<table>
<thead>
<tr>
<th>Terri Helmlinger Ratcliff</th>
<th>Joe Zublena</th>
<th>Fiona Baxter</th>
<th>Mike Seibert</th>
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<tbody>
<tr>
<td>Tina Bennefield</td>
<td>Mike Marlowe</td>
<td>Peggy Blackburn</td>
<td>Tom Birkland</td>
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<td>Gene Fornaro</td>
<td>Lisa Grable</td>
<td>Kaitlin DePersia</td>
<td>Mike Giancola</td>
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<tr>
<td>Howard Scott</td>
<td>Dan Parks</td>
<td>Kay Zimmerman</td>
<td>Marie Griffin</td>
</tr>
<tr>
<td>Susan Jakes</td>
<td>Allison Weaver</td>
<td>Alice Warren</td>
<td>Tyrone Fisher</td>
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**Goals, Objectives and Strategic Actions**

This section describes the goals for the three-year plan (FY 2013-2014, FY 2014-2015 and FY 2015-2016) for the Office with corresponding objectives listed in decreasing order of priority. Each goal includes the relevant sections of the N.C. State University strategic plan and includes subordinate objectives and strategic actions. Related resource allocations are still being developed, although budget requests should match the strategic priorities included here. We will strive to operate as efficiently as possible as well as pursue alternative funding resources to accommodate current budget restrictions.

Also included with each strategic action list are the corresponding metrics, which this Office will use to evaluate results. Second- and third-year goals will be revised based on the results from FY 2013-2014.
As a comprehensive research university in the land-grant tradition, North Carolina State University is dedicated to excellence in teaching and learning, the creation and application of knowledge, and innovation in outreach and engagement programs and partnerships to enhance the economic, intellectual and cultural life of North Carolina residents (and beyond). At N.C. State, outreach and engagement is the basis for the institution’s stated “Quest for Excellence” as it positions the University to strategically establish, formalize, grow and coordinate reciprocal partnerships with a variety of external organization (individuals, communities, businesses, industries, government and educational institutions) with an ultimate goal of impacting all University stakeholders (students, faculty, staff, administrators) in a variety of positive ways. Increasingly, the University’s commitment to innovation, enrichment and problem solving will be defined by an ability to align outreach and engagement efforts across the state, nation and globe. To accomplish this vision, staff must work diligently to ensure that programs and services are efficient, relevant, of high quality and consonant with institutional expertise and student and stakeholder needs. Faculty endeavors in the scholarship of engagement (discovering, translating and applying knowledge) will be a critical component of furthering outreach and engagement efforts and ensuring University commitment “to be rather than to seem to be.”

*This goal supports the University’s strategic planning goals No. 2 and No. 4.*

**Objective:** By 2018, increase (integrate and align) human resources committed to accomplishing the University’s vision for outreach and engagement.

**Strategic Actions:**

1. Establish the leadership and resource capacity necessary to support the goals of a newly established Office of Outreach and Engagement.
2. Build a model of (shared) governance comprised of internal and external stakeholders to inform and drive programs and services/policy and procedure development that meets the identified needs of key stakeholders.
3. Develop a human resources plan to recruit a diverse and talented staff to attain the goals and objectives outlined in this plan.
4. Identify and support a community of scholars interested in researching outreach and engagement topics and impacts (tie to later goal in terms of rank in Carnegie and recognitions/rewards/tenure/promotion).
5. Reapply for the Carnegie Classification for Community Engagement.
6. Pursue the Service Learning Designation.

**Success Measures:** The results of this work will be measured quantitatively with the following metrics: An individual (or individuals) in senior administration is/are responsible for outreach and engagement (Carnegie); proportion of total institutional funds dedicated to outreach and engagement activities (Carnegie); number of full-time equivalent employees responsible for outreach and engagement (Carnegie); number of internal partnerships; partner satisfaction; community-University projects (UNC-GA); number of community partners (UNC-GA); number of service-learning course sections delivered (Carnegie); total enrollment in service-learning courses (Carnegie); number of student-volunteer hours provided to the community (Carnegie); number of community partnerships (Carnegie); identification, participation and retention of partners/all stakeholders; communication logs and minutes of meetings.

**Objective:** By 2018, identify and increase diverse revenue streams to include grants, contracts and fee-based services to support O&E goals outlined in this plan.

**Strategic Actions:**
1. Develop a sound but flexible financial model to support outreach and engagement (office, programs and services).
2. Partner to develop a plan for securing grants and contracts to increase revenue streams.
3. Provide expertise in planning, research and assessment/evaluation to build capacity and generate revenue.
4. Conduct an assessment of current grants and contracts that provide direct and indirect funding to support and advance outreach and engagement.

**Success Measures:** New funding sources identified (and leveraged); evidence of integration and creative use of multiple types and sources of funding/resources; number of community-based research awards (Carnegie); expenditures for community-based research grants and contracts (Carnegie); amount of external funding resulting from outreach and engagement activities (Carnegie); amount of awards of Seed Grants that support and recognize outreach and engagement activities and curricular innovations (Carnegie); number of grant submissions annually; percent increase in number of grants submitted by faculty annually; number of interdisciplinary grants submitted annually.

**Objective:** By 2018, increase access to learning opportunities (the number of attendees participating in) non-credit programs by leveraging state-of-the-art technologies.

**Strategic Actions:**

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*2013-16 Strategic Plan*
1. Conduct an assessment of current, innovative non-credit programs for lifelong learning.
2. Develop a business plan (and supporting business plan) to leverage technologies to support non-credit programs.
3. Conduct an analysis of current registration systems and other potential systems.
4. Transition ownership of Moodle to DELTA.
5. Develop a market-research plan to identify and reach new audiences seeking non-credit learning opportunities.
6. Develop a plan to identify intellectual resources that meet the broad range of non-credit learning needs of individuals, organizations and communities.
7. Develop and implement a robust assessment plan for non-credit programs delivered via distance education (including metrics).

Success Measures: Number of University-community partnerships (Carnegie); number of participants in non-degree distance education (100 percent online) (UNC-GA); number of offerings of non-degree credit distance education (100 percent online) (UNC-GA); number of continuation/professional development experiences (UNC-GA); percentage of market niche; student satisfaction; faculty satisfaction; number of faculty teaching in non-degree distance education programs.

Objective: By 2018, create and sustain a culture of accountability, constant improvement and innovation for outreach and engagement while not losing sight of stakeholder/public needs.

Strategic Actions:
2. Analyze findings from recent assessments to determine trends in outreach and engagement.
3. Hold internal and external forums to develop clear definitions for outreach and engagement.
4. Review and refine, as needed, current charters to support and enhance collaboration.
5. Establish and enhance institutional reporting requirements and performance standards for documenting the effectiveness of university-community partnerships.
6. Develop a robust model for reporting and measuring impact by aligning requirements: SACS, Carnegie, N.C. State strategic plan, UNC-GA etc.
7. Collaborate with the new Sr. Vice Provost office to collect data.
8. Convene meetings across colleges and departments to determine what data is being collected and how it can be used efficiently to fulfill multiple reporting requirements.

9. Disseminate effective practices across the University (and beyond) for collecting data and using it to convey the impact of educational programs to key stakeholders.

10. Hold internal and external forums to gather input and support for goals, objectives and metrics and to identify other potential measures that also communicate an institution’s profile and goals.

11. Develop a university “engagement index” that includes the data collected on the UNC-GA, Carnegie and and/or other relevant measures, and update the index annually, sharing with interested stakeholders.

Success Measures: Number of University-community partnerships (Carnegie); annual measures (to be established) for effectiveness of University-community partnerships (Carnegie); assessment plans and tools are developed in partnership with external partners (Carnegie); attainment of accreditation (no monitoring); attainment of Carnegie Classification for Community Engagement; attainment of Service Learning Designation.

Goal 2: Enhance collaboration and leverage the unique strengths of the internal extension programs to achieve greater economic, social, educational and environmental impacts.

This Office developed a strong collaborative approach to working with its internal extension partners across the University in its interim year. Based on the positive response and resulting successes to the new working method, a primary aim of the Office will be to enhance these collaborative relationships and to provide the "connective tissues" between and among institutional nodes that are carrying out O&E functions. We will act as a dedicated resource for outreach and engagement to support and promote O&E-related programs and activities. We will continue to develop a shared leadership approach, working with our O&E partners across this campus to support the rich diversity of existing programs. We will leverage our shared resources to extend teaching and research beyond the university with maximum, positive impacts. We will also consider and develop new, innovative programs aimed specifically at providing greater economic, social, educational and environmental results to our local and global communities.

This goal supports the University’s strategic planning goals No. 3, No. 4 and No. 5.
**Objective:** Provide the leadership, resources and support to enhance the working partnerships among existing extension, engagement and outreach programs.

**Strategic Actions:**

1. Engage the existing extension programs in the O&E plan; incorporate their ideas and needs.
   - Continue regular meetings with leadership from key extension programs.
   - Examine new models of action and interaction for applicability to N.C. State University outreach and engagement.
   - Explore the use of the "collective impact" model for providing University resources to address community issues.
   - Explore the applicability to N.C. State University activities of the Association of Public and Land-grant Universities (APLU) Commission on Innovation, Competitiveness and Economic Prosperity (CICEP) framework for universities and economic engagement. Use the Model: Developing Innovation, Developing Place, Developing Talent.

**Success Measures:** Participation of programs; impact model(s); tactical plans developed; and evidence of campus inclusion.

**Objective:** Deploy key extension programs to engage external partners on initiatives that will yield greater outcomes and impacts.

**Strategic Actions:**

1. Facilitate and sustain collaboration, cooperation and combined action between programs to produce greater impacts.
   - Identify and prioritize community and organizational issues and opportunities; leverage the key strengths of each program; build collaborative teams.

2. Develop and support the implementation of best management practices of extension, engagement and outreach collaborations.
3. Consider additional internal resources to address initiatives.
4. Evaluate needed external resources to expand capacity.

**Success Measures:** External partner commitment; number of teams; team participation; and external plans.
Goal 3: Develop strategic partnerships in key sectors (including government, economic regions and communities) across North Carolina to ensure the connectedness and enhance the impact of outreach and engagement.

A primary focus for this Office is to build partnerships both internal and external to the University community. The former work will enable us to combine resources, streamline efforts and approach external organizations with a strong, unified message. Initial work will focus on creating a University-wide database of current strategic partnerships. Once completed, we can begin the process of analyzing and evaluating current partnerships with an eye toward identifying opportunities for new relationships as well as encouraging and strengthening existing partnerships. This Office will serve as a champion for strategic partnerships in government, economic regions and communities across our state. We will work to market and promote these to the University community through high-visibility events such as the CINC tour and also connect University subsets with select strategic partnerships, where appropriate. The net impact of this work will be to strengthen the results of our University’s outreach and engagement efforts with its communities.

This goal supports the University’s strategic planning goals No. 3 and No. 5.

Objective: Identify current partnerships.

Strategic Actions:
1. Identify a mechanism to get University-wide input on current partnerships.
2. Gather data, comprehensively identifying all local, state (all state depts.), national government, industry, healthcare, military, non-profit partnerships etc.
3. Create and populate database.

Success Measure: Database created with input from 60% of campus departments and units.

Objective: Establish scope of each partnership.

Strategic Actions:
1. Gather activities and impact statements on partnerships.
2. Input into partnership database.

Success Measure: 50% of partnerships in database have defined scope.

Objective: Evaluate the effectiveness of current partnerships.
Strategic Actions:
1. Apply BEDI metrics to understand effectiveness.
2. Create a communication and reporting tool of partnership scope from the database.

Success Measure: Reports disseminated to key stakeholders.

Objective: Identify and create new strategic partnerships where gaps exist.

Strategic Actions:
1. Analyze partnership gaps.
2. Identify opportunities for new partnerships.
3. Encourage opportunities to get faculty into communities and companies.
4. Create and nurture new partnerships.

Success Measures: The number of new partnerships and first-time engagement by faculty.

Objective: Connect campus resources with select strategic partnerships.

Strategic Actions:
1. Develop high-profile events such as the Connecting in North Carolina (CINC) tour.
2. Connect University Economic Development Office (Tom White) activities with campus resources.
3. Assist in connecting the Institute for Emerging Issues themes, DELTA, STEM initiatives, entrepreneurship etc. with North Carolina communities and campus faculty.

Success Measures: Attendance and outcomes (behavior change) from CINC tour and utilization of partnership report by O&E.

Goal 4: Leverage the distinct characteristics of all outreach and engagement functions to enhance the University mission.

N.C. State University has a broad and deep spectrum of engagement and outreach activities at work throughout the campus and community. The rich diversity of outreach and engagement efforts across this university is having positive, visible impacts in the classroom and beyond. The University units that conduct these programs and activities have distinct characteristics, needs and priorities. We will work to support these efforts. Early work will focus on establishing and maintaining clear communication lines between the Office and these independent O&E functions to identify opportunities to support, promote and coordinate their O&E efforts.
Promotion efforts will focus on celebrating current work and successes as well as seek to provide incentives for new O&E initiatives. In appreciation of the current budget environment, we have limited our memberships to external O&E organizations in clear support of our mission and goals. We will maintain active representative in these groups to support this Office’s work.

This goal supports the University’s strategic planning goals No. 1, No. 2 and No. 5.

**Objective:** Develop clear communication lines within the University for outreach and engagement.

**Strategic Actions:**

1. Create routine methods of contact with the deans of every college, University administration and unit directors.
2. Support the University Standing Committee on Extension and Engagement as a function of the Provost and in its advisory role to the Office of O&E. Maintain economic development as a possible source of engagement in the committee’s work on the SEED grants.
3. Support the AOFEE Executive Council in its work to champion the University O&E function of scholarship of engagement.
4. Maintain active membership in the external outreach and engagement organizations including APLU, ESC and other relevant groups.
   - Pay membership dues.
   - Appoint board and other team members as appropriate.
   - Provide travel funds for VP and other University members to attend conference meetings. Include faculty and staff presenting at conference.
   - Appoint and convene task forces as necessary.
5. Meet regularly with the engagement network, including engagement representatives from faculty, staff, student, international, continuing education and economic development groups.

**Objective:** Support, enhance and incentivize new initiatives in outreach and engagement.

**Strategic Actions:**

1. Coordinate with USCoEE to ensure SEED grant criteria reflect engagement with community partners with interdisciplinary teams; help tenure-track faculty to improve their credentials for tenure; and support engagement educational experiences.
2. Establish a sustainable program for funding, selecting and promoting outcomes of
Outreach & Engagement

3. Create a function to follow-up on SEED grant programs in order to track impact.
4. Explore additional methods for incentivizing new initiatives.

Objective: Create a celebration culture to extend the full breadth of outreach and engagement across the university.

Strategic Actions:
1. Manage internal and external outreach and engagement award processes (Opal Mann Green, Kellogg/Magrath, BOG Award for Excellence in Public Service).
2. Plan and implement annual recognition event.
   - Appoint and convene planning committee.
   - Plan the event and handle logistics.
   - Promote event across N.C. State, community and partners.
   - Induct new AOFEE members—OOE staff and AOFEE executive council.
   - Coordinate recognition of Outstanding Extension & Engagement Awards.
3. Develop ongoing communication plan with University Communications (O&E website, University website, Bulletin, Alumni Magazine etc.)

Goal 5: Maximize the awareness of the Office of Outreach & Engagement through strategic communications to all internal and external partners.

To maximize the impact of the University’s integrated work in the area of outreach and engagement, this Office will serve as the information source for how N.C. State is helping the people and institutions of North Carolina and beyond. We will serve as the official support and promotion of O&E at N.C. State and the “drumbeaters” for this critical component of our University’s land-grant mission. Work on the technology tools, including a foundational internal communications platform and portal, will support and coincide with our work to create two-way communication patterns between the Office and our internal and external partners. We will build on the work accomplished in our interim year by the Internal Network Communications Task Force to establish communication channels like the new O&E website to provide methods for capturing new O&E opportunities, promoting successes, and ultimately, creating an established norm for communication between this Office and its O&E partners.

This goal supports the University’s strategic planning goals No. 3 and No. 5.
Objective: Initiate and maintain clear lines of communication with internal and external partners.

Strategic Actions:
1. Develop and implement a strategic communications plan.
2. Develop and build a new O&E high-performance communications website.
3. Create opportunities for partners (e.g., University Communications, Development Office, Alumni Office, administrators and faculty members) to learn about O&E functions and the benefits to their offices.
4. Identify and develop new alliances, while strengthening existing relationships, with external partners to build new communication bridges (e.g., UNC-GA, business, industry, government, academic partners, elected leaders etc.).
5. Develop an ongoing analytics system to review and measure the success for the new O&E high-performance website.
6. Ensure that the Internal Network Communications Task Force works strategically with the University Communications group to ensure that the fit occurs immediately and is evergreen.

Objective: Initiate and maintain clear lines of communication with internal partners to allow them to identify future internal resources and partnership opportunities.

Strategic Actions:
1. Create an O&E virtual partnership communication interchange/portal that will continue to serve the University’s engagement network.
2. Create opportunities for internal partners to learn about the new O&E internal partnership virtual communications platform/portal.
3. Provide the engagement network with a virtual meeting place and repository for O&E-related archives via the virtual communications interchange platform.
4. Explore the University’s Google applications for document sharing, cooperative planning and virtual-meeting functions.
5. Develop an ongoing analytics systems review to measure success of the communications interchange.

Success Measures: Development and implementation of an internal communications platform and resource portal and the development of an analytics reporting system for the internal virtual communications interchange.

Conclusion
The Office of Outreach and Engagement at N.C. State University is in a foundational phase with 2013 marking its official establishment. This three-year strategic plan builds on the work and
success resulting from the Office’s interim year in 2012 during which the Office tested out a new way of doing business.

Our next step will be to develop a timeline for the objectives and strategies outlined here as well as resource plan that will enable us to complete the substantial work included herein.

By maintaining a primary focus on developing, strengthening and encouraging internal and external strategic partnerships, we will aim to maximize our resources, avoid duplicative efforts and promote operational efficiency. As we move forward, we will continue to assess our progress using feedback from these partnerships, the newly established communication channels and our data gathering and metrics work. We will refine our plan, if necessary, to ensure we are delivering on our mission of leading and modeling exemplary outreach and engagement, bringing forth new and strengthening existing collaborations resulting in meaningful economic, social, educational and environmental impacts. Fulfilling our mission will enable us to support the land-grant mission of N.C. State, and we will work in earnest to see this through.