4-H cyd CENTER FOR YOUTH DEVELOPMENT

SPECIAL REPORT

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4-H Pilot Leadership Plan: Year 2 Implementation and Evaluation 2008

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EXECUTIVE SUMMARY

In 2007 and 2008, the 4-H Pilot Leadership team implemented and evaluated a new staff structure in each of the three University of California's Division of Agriculture and Natural Resources (UC ANR) and the University of California Cooperative Extension (UCCE) admistrative regions as part of the 4-H Youth Development Program (4-H YDP) Pilot Leadership Staffing Plan.

The 4-H YDP Pilot Leadership Plan was developed to field–test and evaluate specific elements of the 4-H Staffing Task Force report, The University of California 4-H Youth Development Program Revised Proposal for 4-H Staffing (November, 2005), at the recommendation of the California Statewide 4-H Youth Development Program Five Year Review Report (September, 2006).

The goal of the pilot was to measure the effectiveness of the plan in achieving the following desired outcomes:

- Create statewide 4-H YDP consistency within clusters, regions and across the state, including improved internal and external communications;
- Improve management and delivery of 4-H YD programs through effective engagement of program representatives.
- Increase the effectiveness of 4-H YDP academics in applied research, creative activity and opportunities for training and enhancing educational curriculum.
- Define and measure the new role of the academic coordinator in providing support to program representatives by bridging research and practice through training, creation of management and other tools and coordinating policy in partnership with the Statewide 4-H YDP.

County clustering has been used in other states with evidence of benefits for field staff and improved program quality (Hutchins, 1992, Cropper & Merkowitz, 1998). More recent information indicates that atleast five other states use some form of county clustering with similar benefits reported.

For the California staffing pilot, each of the regions came up with specific strategies and priority goals based on regional and cluster needs. In the North Coast and Mountain Region (NCMR), the focus was on building staff capacity and establishing an infrastructure for staff professional development and networking. In the Central Valley Region (CVR), the focus was on shared program development to increase efficiencies in administration and programming and enhance opportunities for youth and volunteers through sharing cross-county resources. In the Central Coast and South Region (CCSR), the emphasis was both on building staff capacity and professional development as well as creating a cluster level system for volunteer management and program administration.

Overview of Year 1 findings, recommendations and actions taken

There was evidence that county clustering with a coordinator led to increased communication across clusters and statewide which also increased consistency in policy and programming. The majority of program representatives were positive about the plan and noted participation in a cluster had increased training opportunities, provided additional support, and/or relieved feelings of isolation. There was mixed buy-in from advisors and county directors especially in the CVR and CCSR regions.

In Year 1, the main issues encountered during the Pilot implementation were:

- *For program representatives*: the range of job classifications, work hours, and available administrative support affected their ability to participate in cluster activities; and, in some cases, led to feelings of inequitable contribution to the cluster.
- *For cluster personnel overall*: The role of the academic coordinator was unclear to the majority of personnel; and particularly, the extent to which coordinators would be involved in management issues and conflicts in individual cluster counties. Some individuals noted lack of clarity on how lines of communication had changed since the Pilot had begun while others indicated they would like more information on what the other clusters were doing.
- *For 4-H Youth Development Advisors*: Their role in the cluster was not clearly defined at the onset.

At the end of Year 1, the following recommendations were made:

- Further define the role of the academic coordinator and communicate this role to each cluster.[1]
- Continue discussion and communicate decisions on the role of advisor in clusters and statewide.
- Appoint a committee to examine and address the job classifications of Program Representative and associated issues.
- Provide ongoing information about the Pilot to cluster personnel and statewide.
- Define the lines of authority, administrative boundaries and lines of communication so that the former support the goals of each cluster.
- Continue with Years 2 and 3 of the Pilot Leadership Plan, further documenting the promising practices identified through the process and implementing what is being learned.
- Address issues of funding to support sharing training and resources across clusters and statewide.

Action taken based on recommendations of Year 1:

- The pilot leadership team met with regional directors to gain feedback on the recommendations. Responsibilities of the academic coordinator was communicated to cluster personnel.
- The California 4-H Cluster Updates was launched to communicate developments in the clusters to a statewide audience.
- While there was an expressed intent to form a committee to reconcile incongruencies in program representative positions, implementation was constrained by the overall downturn in the economy and anticipated cuts within the Division of Agriculture and Natural Resources.
- Measurable objectives for the Pilot were further refined and summarized in a logic model.

Cluster activities in Year 2

In Year 2, each of the clusters continued implementing their goals and strategies with increased emphasis in certain areas. The North Coast and Mountain Region continued to provide staff support with additional training opportunities. New in Year 2 was assigning three program representatives, one for each of the pre-existing sub-regions, the role of key contacts in order to further support staff at the local level. The Central Valley Region cluster sought to further reduce duplication of effort at the county level. It developed templates which all four counties could used for their county 4-H newsletter and developed a standardized orientation for new volunteers. The Central Coast and Southern Region continued with program representative capacity building with further emphasis on efficient systems for volunteer management, consistent policy interpretation across cluster counties and shared programming.

Evaluation of the Pilot implementation in Year 2

In Year 2, the emphasis was on documenting progress towards the desired objectives, i.e. summative impact overall of the Pilot and by cluster. Based on the logic model outlined by the Pilot leadership team, the following specific areas were measured:

a. Progress on desired objectives
b. Feasibility of the cluster coordinator role
c. Overall attitude about the benefit of the Pilot, including attitude of non-cluster personnel (advisors)
d. Contrast between a regional cluster and a sub-regional cluster
e. Observation of promising practices
f. Documentation of issues

Data for Year 2 came from surveys of non-cluster personnel, surveys from cluster personnel, observations of events, interviews and reflection notes of cluster coordinator experiences.

Year 2 Findings

Overall perceptions about the benefit of the Pilot:

- A significant majority (94%) of program representatives agreed that participation in clustered counties with a coordinator was beneficial.
    - Above 85% reported increased access to trainings
    - Above 60% reported increased access to resources for programs
- Slightly more than half of advisors and county directors who responded to the survey were positive in their overall impressions (5 out of 8 advisors and 11 out of 20 county directors).

1 Cluster coordinators came to consensus on their responsibilities in Year 1.

Progress on desired objectives:

- Communication and consistency across clusters and region increased.
- Significant increase in program representative support, confidence and job satisfaction
- Half of the advisors agreed that county clustering with a coordinator enhanced their role in research, evaluation and education by providing increased opportunities in these areas.
- There was more cross-county collaboration and increased efficiency in administrative tasks leading to reduced cost.
- Programming for youth and volunteers was enhanced as a result of increased capacity of program representatives and new opportunities across county lines.

Additional insights

- There was greater clarity on the role of the cluster coordinator at the end of Year 2 compared to at the end of Year 1. All three coordinators continued to feel the strain of the dual role of advisor-coordinator.
- Both regional and sub-regional cluster models worked to achieve desired outcomes. Both have benefits and limitations.
- There was uneven buy-in for county clustering among non-participating advisors. Several non participating program representatives availed of cluster trainings that were open to a statewide audience.

Implications and Recommendations

There is enough evidence to suggest that county clustering with a coordinator role is beneficial to the 4-H Youth Development Program in cluster counties. The following are recommendations made by the Pilot Leadership Team:

- Cluster counties in California with the support and under the leadership of an academic.
- Adopt a regional cluster model, with formal or informal sub-regional groups.
- Determine a system of regional or cluster leadership provided by a 4-H youth development advisor or other academic.
- Provide opportunities for advisors to share their expertise statewide and continue to re-conceptualize the role of a 4-H youth development advisor in a new staff structure
- Cluster coordinators should work in a unified way with programmatic leadership from the 4-H State Office
- Communicate new lines of communication between county personnel, cluster coordinators and the 4-H State Office to all personnel.
- Revisit the concept of a committee to reconcile 4-H program representative employment inequities from a statewide perspective.

Guidelines for successful county clustering:

- Communicate regularly with all county directors about cluster business.
- Utilize technology (such as Adobe Connect, tech tools) wherever appropriate for training and as a way to minimize travel.
- Allow sub-regional groups to self-select to ensure common vision and buy-in.
- Provide staff support and opportunities for capacity building.
- Focus on reducing duplication of effort through shared programming at the sub-regional level.
- Build a team of cluster coordinators who work closely with the State 4-H Director and have regular communications.
- Have cluster coordinators serve on key statewide committees.
- Engage 4-H Youth Development Advisors in training and planning cluster-level programming, research and evaluation.

Conclusion

During the two years of the implementation of the 4-H Pilot Leadership Plan, we have learned a great deal about the effectiveness of new ways of structuring the 4-H Youth Development Program. We hope that the insights shared based on this experience will inform the thoughtful planning of future county clustering efforts and ensure a successful and sustainable staffing structure for the 4-H program.

BACKGROUND

In the summer of 2007, the 4-H Pilot Leadership Team began implementing and evaluating a new staffing structure for the 4-H Youth Development Program in each of the three University of California's Division of Agriculture and Natural Resources Regions as part of the 4-H Pilot Leadership Plan. The 4-H Pilot Leadership Plan was developed to field-test and evaluate specific elements of the 4-H Staffing Task Force report, ***The University of California 4-H Youth Development Program Revised Proposal for 4-H Staffing*** (November, 2005), at the recommendation of the ***California Statewide 4-H Youth Development Program Five Year Review Report*** (September, 2006).

The Staffing Task Force was charged to "develop a new structure for staffing the 4-H Youth Development Program, to respond to budget and other challenges facing the 4-H Youth Development Program, and take advantage of emerging opportunities in the field of youth development." The plan was envisioned to represent a new way of administering the 4-H youth development program, while strengthening coordination among staff and groups of counties within regions, and to effectively maximize staff resources.

Essentially the staffing model was originally proposed by the Staffing Task Force as a "sub-regional approach" to strengthen coordination among groups of counties within a region and to effectively maximize resources and reduce duplication. In the model, local programs continued to be managed by program representatives with support provided by an "academic coordinator". Advisors would work in teams within the sub-regions and focus their attention on applied research, dissemination and publication as well as to help assess and evaluate program needs within their sub-region.

County clustering in other states: A brief review

County clustering is not new to the Cooperative Extension system. County clustering has been incorporated when there have been financial constraints, increased staff turnover or early retirements, or there has been a need for increased staff specialization. It has also been utilized to meet the needs of clientele or solve issues that are not confined to county boundaries (Bartholomew & Smith, 1990; Hutchins, 1992; Cropper & Merkowitz, 1998)

The literature on clustering has tended to view clustering as favorable – especially when extension agent specialization has been a tandem goal. Clustering has provided opportunities for counties to create new programs, has generally been seen as enhancing camaraderie and job satisfaction and enhancing program content and efficiency in delivery (Cropper & Merkowitz, 1998; Hutchins, 1992). Clustering has not been without issues however. Issues that were cited included the increased time and increased management functions required on behalf of clusters.

In order to obtain more recent information, in June 2009, the 4-H Center for Youth Development sent out an online national survey to identify states that had county clustering and gain insights into their experience with this extension model. Out of sixteen states that responded to the survey, five had experienced county clustering (namely, Colorado, Ohio, Montana, Massachusetts and Minnesota) and two were moving in that direction (Michigan and Maryland). The five states mentioned above reported dwindling staff resources and budgetary constraints as reasons for adopting a cluster model. In two of the states, the cluster administrator, known as area director, was based in the county. Two other states reported that the administrator, called the area extension educator, was regionally based and in the fifth state, a state staff person provided oversight for the clusters. In all five states, clustering was not only for the 4-H Program. In three states, clustering was adopted by all of Cooperative Extension and for two of the states it was mainly 4-H and nutrition.

Table 1 on page seven shows the benefits and challenges cited by survey respondents from the five states that have experienced county clustering.

Table 1: Perceptions of benefits and issues associated with clustering in other states

Benefits
Money savings
Creates more cohesive units
Allows counties to have extension presence who otherwise would not
Challenges
Transition is challenging
Understanding of clustering by county commissioners
Less hands–on approach with volunteers owing to larger geographic area
Increased travel time

In line with the earlier literature, county clustering is perceived to be beneficial for creating more cohesion and consistency, for increasing budgetary efficiencies and allowing counties to avail themselves to extension resources that would be limited in a county based model. Issues mentioned included the difficulty of transition – one state was hopeful that staff and clientele would eventually buy-in to the new system, but that this would take time. Another mentioned the challenge of having the support of county commissioners for a system that emphasized cross-county collaboration and resource sharing. Clustering may result in transitioning to a less hands on approach with volunteers since a greater geographic area is covered or increasing travel time for personnel within a cluster, although the use of technology was mentioned as possibly addressing this latter point.

The 4-H Pilot Leadership Plan

Three county clusters participated in the 4-H Pilot Leadership Plan implementation and evaluation, namely, the North Coast and Mountain Region cluster (NCMR), which includes 23 counties; the Central Valley Region cluster (CVR) – a four county cluster; and the Central Coast and Southern Region Cluster (CCSR) – a six county cluster. Figure 1 indicates the counties participating in the Pilot in each of the three regions.

The 4-H Pilot Leadership Plan differed from the original staffing plan due to budget constraints and regional needs. Some main aspects of the plan that differed were having a part-time advisor in a cluster coordinator[1] role rather than a full-time academic coordinator, and having one regional coordinator, as opposed to three sub-regional academic coordinators in the North Coast and Mountain Region (See Table 3). The implications were that the Pilot was able to test the feasibility of a sub-regional model as well as a regional model. In addition, the Pilot tested the feasibility of a split time role for an advisor taking on a coordinator role rather than the full-time academic coordinator originally proposed. How this role differed based on the size of the cluster and proposed goals were also taken into consideration.

2 At the end of Year 2 the Pilot Leadership Team felt the term "cluster coordinator" was more appropriate than the title "academic coordinator" for advisors who were taking on this role part-time. While the term "academic coordinator" was used in the Year 1 report, in this report, we use the term cluster coordinator to better reflect the nature of the position.

Table 2: How the Pilot Leadership Plan deviates from the original staffing proposal (2005)

How the Pilot Leadership Plan deviates from the original Staffing Proposal (2005)

Due to budgetary and other administrative considerations, the Pilot Leadership Plan looks different from the original proposal in the Staffing Report. There was consensus among the Pilot Leadership Team and the regional directors that the current implementation was an adaptation of the original plan proposed. Some of the key variations from the original plan are as follows:

- The original sub-regional layout was proposed in alignment with the Sections[2] while the current implementation areas are not.
- The original recommendation was that the North Coast and Mountain Region have three academic coordinators, one for each sub-region. Instead, the current implementation incorporates one academic coordinator for the entire region.
- The Central Valley Region sub-region was proposed to include ten counties, currently, four out of the ten are currently participating in the Pilot.
- The Central Coast and Southern Region sub-region looks slightly different from the originally recommended grouping. The four-county cluster was expanded to six counties by the end of Year 1.
- The Regional Academic Coordinator position, as originally recommended, is a full-time position; the pilot is testing this role through 50% appointments.

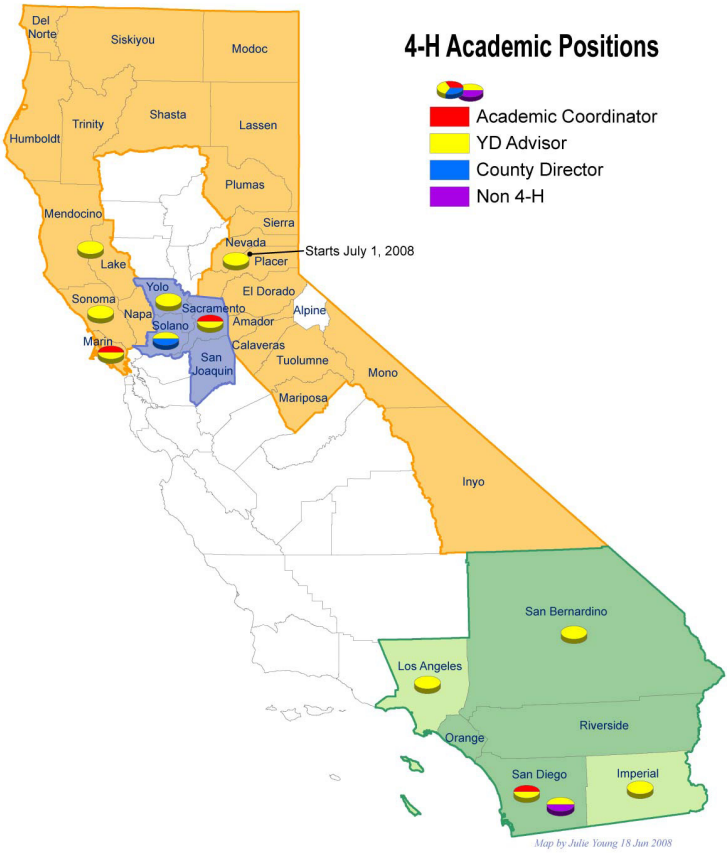
In Year 2 of the 4-H Pilot Leadership Plan, the desired objectives remained the same as those for Year 1, namely to:

- Create statewide 4-H YDP consistency within clusters, regions, and across the state, including improved internal and external communication.
- Improve management and delivery of 4-H youth development programs through effective engagement of program representatives, better coordination of programmatic efforts within clusters and regions and with the Statewide 4-H YDP and strengthening connections with other ANR programs.
- Increase the effectiveness of 4-H YDP academics in applied research, creative activity, dissemination, publication including the improvement and enhancement of educational curriculum, and supporting the mission and direction of ANR.
- Define and measure the new role of the academic coordinator in providing support to program representatives, by bridging research to practice through training, creation of management and other tools and coordinating policy in partnership with the Statewide 4-H YDP Office.

The Year 1 evaluation report documented the initial perspectives from staff, preliminary impacts of the plan and formative findings to continue implementing the Pilot successfully. This Year 2 report focuses on summative impacts and gaining insights to make recommendations and suggestions for an efficient and sustainable staffing structure for the 4-H Youth Development Program.

3 The Sections are volunteer based administrative areas in the California 4-H YDP, that follow previous state regional lines.

Figure 1: Map with the counties and academic personnel participating in the 4-H Pilot Leadership Plan



Year 1 Findings, Recommendations and Actions Taken

In Year 1, evaluation findings indicated that county clustering with a coordinator led to increased communication across clusters which also increased consistency in policy and programming statewide. The majority of program representatives perceived the Plan as beneficial to them. Increased training opportunities, level of support and relief from isolation were among the reported benefits. 4-H Youth Development Advisors and county directors within clusters varied from feeling optimistic to ambiguous about the Pilot with a minority who were negative. In the CVR and CCSR clusters, a third indicated they were in a "wait and see" mode.

In Year 1, several issues came to light. These were:

- *Inequities in 4-H program representative status.* This structural issue was pre-existing and outside the direct scope of the Pilot to address. These inequities did have a direct effect on the Pilot since the variations in program representative FTE, classification and funding sources affected their ability to participate equally and fully in cluster activities. Participation was further affected by the availability of clerical or administrative support in each cluster county.
- *The role of the cluster coordinator was unclear.* A majority of personnel including cluster coordinators grappled with the lines of authority and scope of their role. There were questions about the extent to which coordinators would be involved in county-level management tasks.
- *The role and level of involvement of the 4-H Youth Development Advisor within the cluster was unclear.* In the first year of the Pilot implementation, advisors did not feel the Pilot had impacted their own work. It was necessary to clarify advisor roles with respect to statewide or regional tasks in order to conceptualize how county clustering could impact the role of an advisor. For instance, advisors in participating counties still felt a primary responsibility to management of local programs.
- *Communication about the Pilot across the state before and during the first year was inadequate.* Some cluster personnel were unsure of how lines of communication had changed with the implementation of the Pilot. Others expressed a desire for information on the progress and activities of other clusters.

At the end of Year 1, the following recommendations were made based on the findings and issue cited above.

- Further define the role of the academic coordinator (see Table 2) and communicate this role to each cluster.[1]
- Continue discussion and communicate decisions on the role of advisor in clusters and statewide.
- Appoint a committee to examine and resolve Program Representative job classification and associated issues.
- Provide ongoing information about the Pilot for all cluster personnel and statewide.
- Define clearly lines of authority, administrative boundaries and lines of communication for all cluster personnel so that the former support the goals of each cluster.
- Continue with Years 2 and 3 of the Pilot Leadership Plan, further documenting the promising practices identified through the process and implementing what is being learned.
- Address issues of funding to support sharing training and resources across clusters and statewide.

Table 3: Proposed roles of cluster coordinators as determined at the end of Year 1

Communication
• Assure communication cluster-wide. • Communicate with County Directors on an on-going basis. Attend occasional regional meetings of County Directors and educate County Directors on positive youth development. • Act as first point of contact for Program Representatives, County Directors, or Regional Director. The state 4-H office can be contacted directly but the answer should be copied to the Academic Coordinator.
Policy
• Help Program Representatives with policy interpretation and alert cluster personnel, including County Directors of new policies.
Program Support
• Be a resource for Program Representatives in club operations and other program delivery modalities (ex: after-school programs, camp programs). • Help develop strategies to support county programs during personnel transitions. • Work with cluster staff to reduce redundancy in program administration. • Work together to secure funds for new programs.
Training, Resources and other Support for Program Representatives
• Help Program representatives identify professional development needs, coordinate trainings and facilitate access to information resources. • Share best practices and introduce new curriculum to Program Representatives. • Help Program Representatives identify research needs of their 4-H programs and communicate these to academics. • Facilitate mentoring arrangements for Program Representatives without an Advisor.
Recruitment and Orientation
• Be engaged in the hiring process for new Program Representatives or Advisors in cluster to ensure personnel have the appropriate skills and complement the skill sets of others in cluster. • Provide orientation of Advisors, Program Representatives and County Directors in cluster.

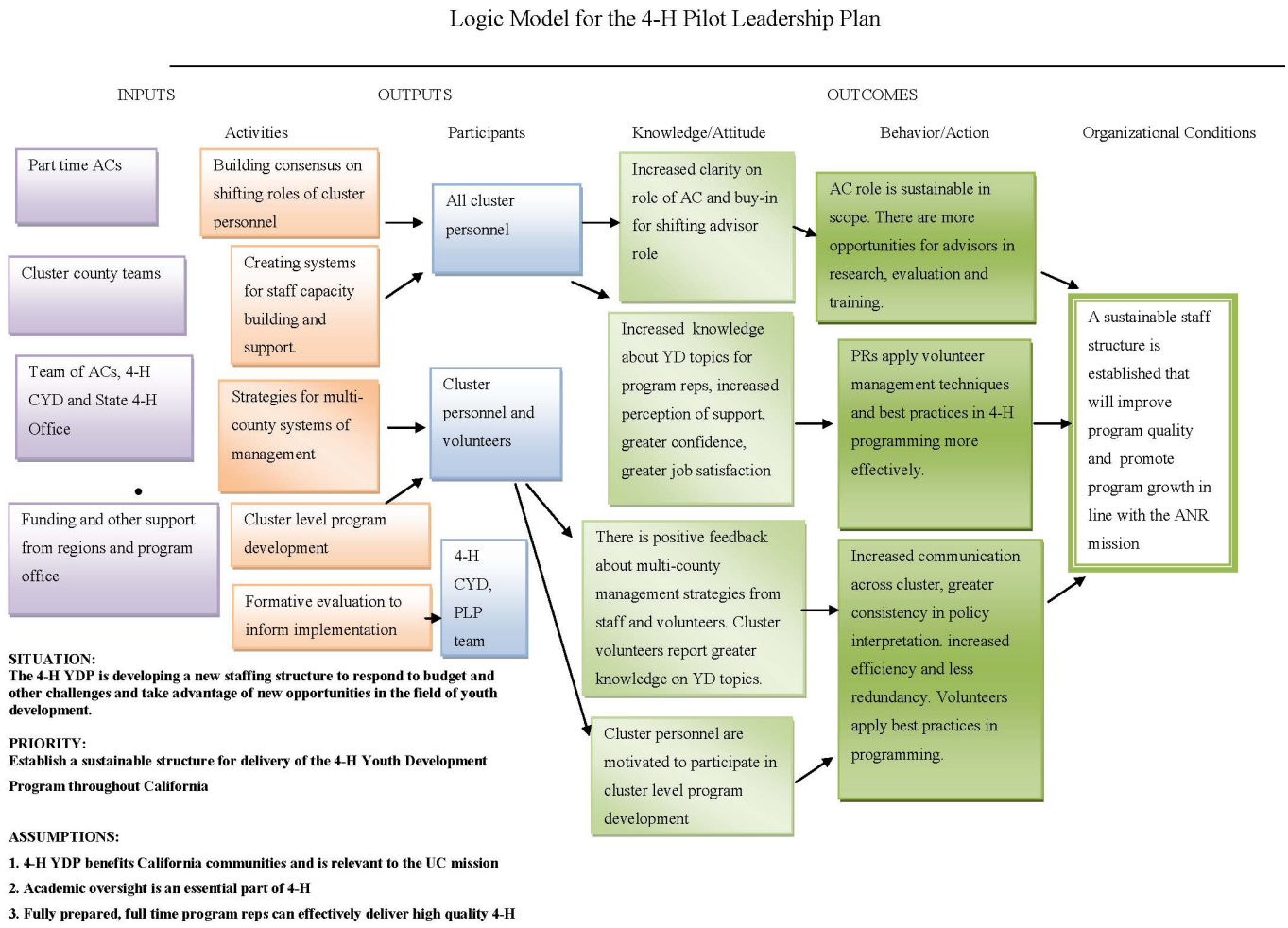
The following actions were taken based on recommendations

- *Clarified the role of the cluster coordinator.* At the start of Year 2, the cluster coordinators for CCSR and CVR met with county directors, advisors and program representatives to obtain clarity and reach consensus on their roles.
- *Lines of authority and administration.* In December 2008, the Pilot Leadership Team met with the three regional directors to clarify the lines of authority and communication. The regional directors then provided an update to cluster personnel via e-mail .
- *The California 4-H Cluster Updates.* This online newsletter was created to address a gap in communication on the Pilot and to raise awareness of cluster activities statewide. The 4-H Center for Youth Development worked with the 4-H State Office in preparing the quarterly newsletter which featured information on each of the clusters and the perspectives of cluster personnel.
- *A committee to examine the status of program representatives.* Although a committee was appointed to examine the job classifications, funding sources, and FTE status of Program Representatives, this area has yet to receive further

4 Cluster coordinators came together in Year 1 and came to a consensus on a list of expectations from cluster personnel (generated from end of year interviews) that they considered appropriate for their role.

- *The Logic Model for the Pilot Leadership Plan.* This model was developed to guide the overall implementation of the Pilot. While each cluster created logic models to guide their unique goals, the overall logic model (see Figure 2) provides a cohesive plan for the Pilot and provided a map for assessing progress.

Figure 2: Logic Model for the 4-H Pilot Leadership Plan



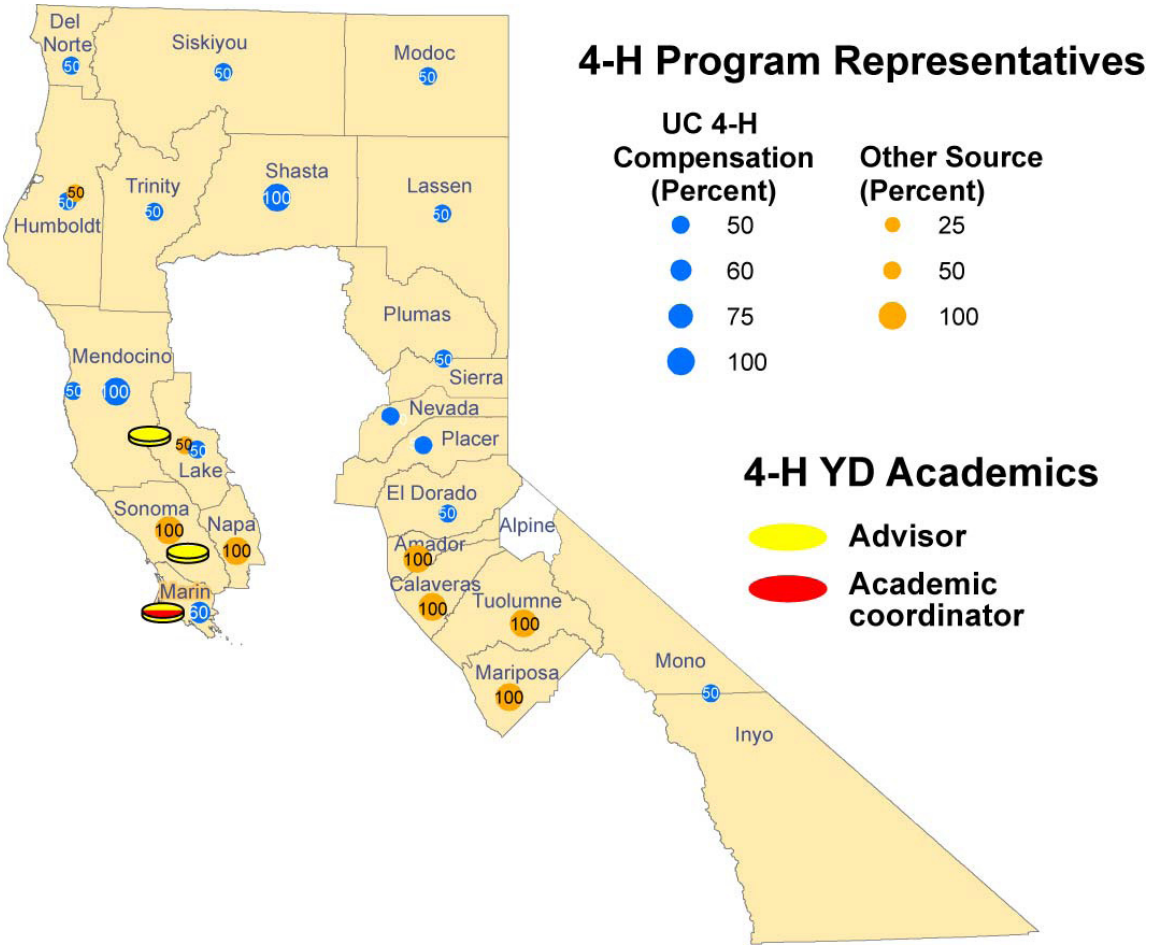
CLUSTER ACTIVITIES AND GOALS IN YEAR 2

The following section outlines the activities and outputs of each of the clusters in Year 2.

North Coast and Mountain Region Cluster

In the North Coast and Mountain Region, the cluster encompassed the entire region. This was thought to be workable due to two main factors, a) program representatives in the region were already used to working together in a sub-regional format, and b) personnel were also used to the idea of a program coordinator – a role taken on by a program representative in recent years. In the NCMR technology tools were used to provide a platform for communication and sharing of information resources among program representatives, with the cluster coordinator as key facilitator of the process. Figure 3 on page 12 shows the staff profile of the NCMR cluster.

Figure 3: NCMR cluster staffing profile



The focus on professional development of program representatives continued in Year 2 with new opportunities for peer sharing.

Staff development and support

The main delivery mode for staff training was monthly conference calls. These were enhanced by visual interface through Adobe Connect with between 12 and 18 participants. In addition to these calls, there were two in person training workshops in Fall 2008 and Winter 2009. In order to ensure that workshop and conference call resources were available, most calls and sessions were recorded and posted on a web-site for staff access. Trainers included advisors from counties outside the cluster, advisors from within the cluster, and personnel from the UC campus as well as other areas of ANR (The Division of Agricultural and Natural Resources). The cluster coordinator mediated the trainings by preparing the trainers to present using virtual technology as well as providing them with feedback to ensure that the trainings were relevant to staff. Program representatives were encouraged to share with their peers how the particular training area was applicable to their work.

Working with the sub-regional structure

New this year was that each of the three sub-regions[1] in the NCMR selected a program representative to serve as the key contact for their subregion. The key contacts' role was to support their peers and facilitate communication between the cluster coordinator, and staff in the sub-regions.

5 The three sub-regions in the North Coast and Mountain Region are pre-existing groups of counties that have been working together prior to the pilot. For a map of the sub-regions and more details about the sub-regional structure see pages # and # in the Year 1 report: http:

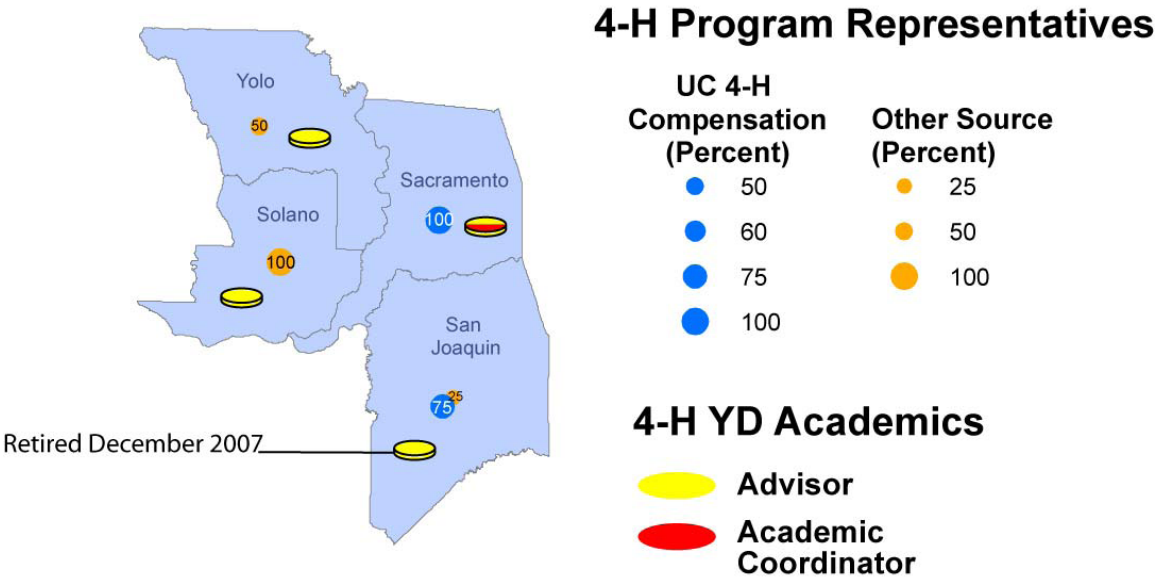
Table 4: Sequence of staff development opportunities (July 2008 – June 2009)

Topic	Notes
Farm to Fork training	Academic coordinator secured funds to 6 cluster staff to attend
Tech Tools hands-on training (Adobe Connect and ANR Portal)	Participants from all three regions and from outside 4-H
Staff sharing of resources used during a subregional retreat	Nine staff presenters with most sharing their resources online
Introduction to the Program Logic Model	Presenter: CCSR advisor C. Barnett
Life skills	Presenter: CCSR advisor L. Schmitt-McQuitty
Conflict Management	Guest: C. Penny, UCD
Volunteer Leader modules and Positive Youth Development	Presenters: NCMR representative J. Frazell and advisor S. Dogan; some participants were on site and others accessed remotely.
Affirmative Action and Outreach	Presenter: E. Britt, UCD
Culture	Presenter: A. Baameur, UCCE
4-H Online (online enrollment system) needs assessment	Presenters: 4-H State Office staff H. Tong and S. Worker
4-H Online demonstrations and practice sessions	Presenters: various program representatives and support staff

Central Valley Region Cluster

In the Central Valley Region, administrative and staffing considerations led to the four county cluster format. Fig 4. shows the staff profile of the Central Valley Cluster at the beginning of the pilot.

Figure 4: CVR cluster staffing profile



Building on the achievements of Year 1, the Central Valley Region continued to support cluster-wide initiatives with the purpose of streamlining administrative tasks, achieving cost savings, maintaining quality programs, and achieving greater consistency between counties.

Volunteer Leader Training and standardized orientation

With the decrease in ANR personnel, the CVR Cluster recognized the importance of mobilizing volunteer resources in new roles. In year one, the Cluster identified volunteer training as need and in year two organized training teams of staff,

volunteers and youth in each county to deliver the volunteer development training modules created by the Volunteer Development Workgroup. In the months following the Volunteer Leader Training, cluster staff adapted one of the modules – 4-H Project Planning – to meet the needs of volunteer leaders in the four-county cluster. The adapted module was used during a Volunteer Leader Training in Sacramento and further refined based on the feedback received from participants.

Cluster staff and academics recognized the benefits of standardizing new volunteer leader orientation in all counties. The cluster has created a uniform orientation to be used within and beyond the cluster. The uniform orientation allows volunteers to participate in training in other counties (and at a time and place that is most convenient) and satisfies their home county's requirement for orientation. The Statewide 4-H office provided support for the development of a standard new orientation training package, envisioning its adoption statewide.

Staff Development
Staff development was not identified as a Cluster priority in year one as at that time all four Cluster counties had a 4-H Advisor with whom Program Representatives met regularly. However, staff from this cluster actively participated in the technology tools training (and other training sessions coordinated by the cluster coordinator of the North Coast and Mountain Region) and the follow-up practice sessions.

As mentioned above, in Fall 2008, Program Representatives from this cluster trained as trainers during the "Working with 4-H Members" and "4-H Project Planning" modules of the Volunteer Leader Training. The following day, they were participants during the morning training on "4-H Project Meeting" and "Citizenship, Leadership & Other Life Skills" modules. In the afternoon, CVR program representatives became the trainers to the Cluster Training Teams (twelve cluster adult volunteers and four youth) and delivered the previous day's modules.

Cluster newsletter
A template was created that would allow each county to produce and publish a 4-H newsletter in an efficient manner. The notices, events, and calendar items common to all four counties were centrally generated by Sacramento County, reducing duplication of effort. Using the space allotted in the template, cluster counties were able to add in county-specific items. In order to further increase efficiency, Yolo County had already been distributing its newsletter primarily via e-mail subscription with the other three counties gradually following suit.

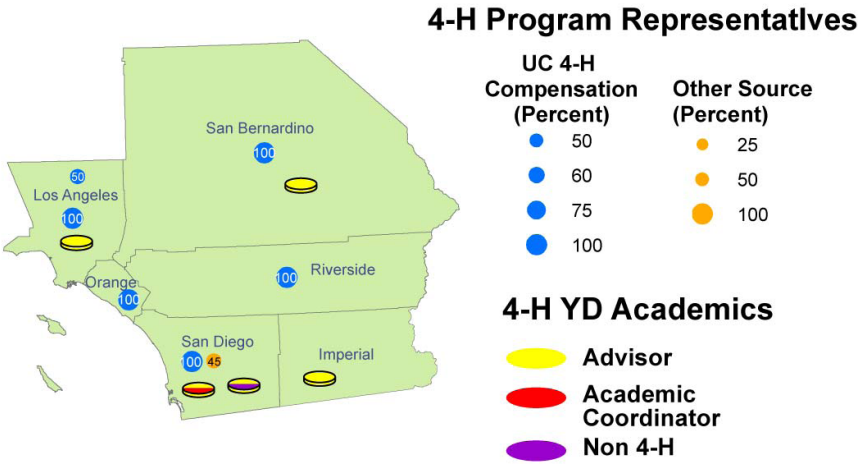
Shared programming
This year, several county events and program were opened to 4-H members from any cluster county Sacramento and San Joaquin residential camps accepted applicants from Yolo and Solano counties, thus allowing 4-H families great choice and flexibility in camp dates and program. Parents are now able to choose the camp that best suit their needs.

In April 2009, San Joaquin County hosted events that attracted participants from other counties. The Tractor and Vegetable Field Day was well attended with at total of 50 people representing all four Cluster counties. Three Solano County 4-H members took part in the Fashion Revue, which normally they would have missed as no such event was planned in their home county.

Central Coast and Southern Region Cluster

In the Central Coast and South Region, geographic and administrative considerations led to the four county cluster, and ultimately to an addition of two more counties by the end of the first year. Figure 4 on page 15 shows staff profiles in this cluster.

Figure 5: CCSR cluster staffing profile



The cluster maintained its focus on its overall goals for the Pilot. These were to strengthen coordination among staff, maximize staff and program resources, and be responsive to the needs of local clientele.

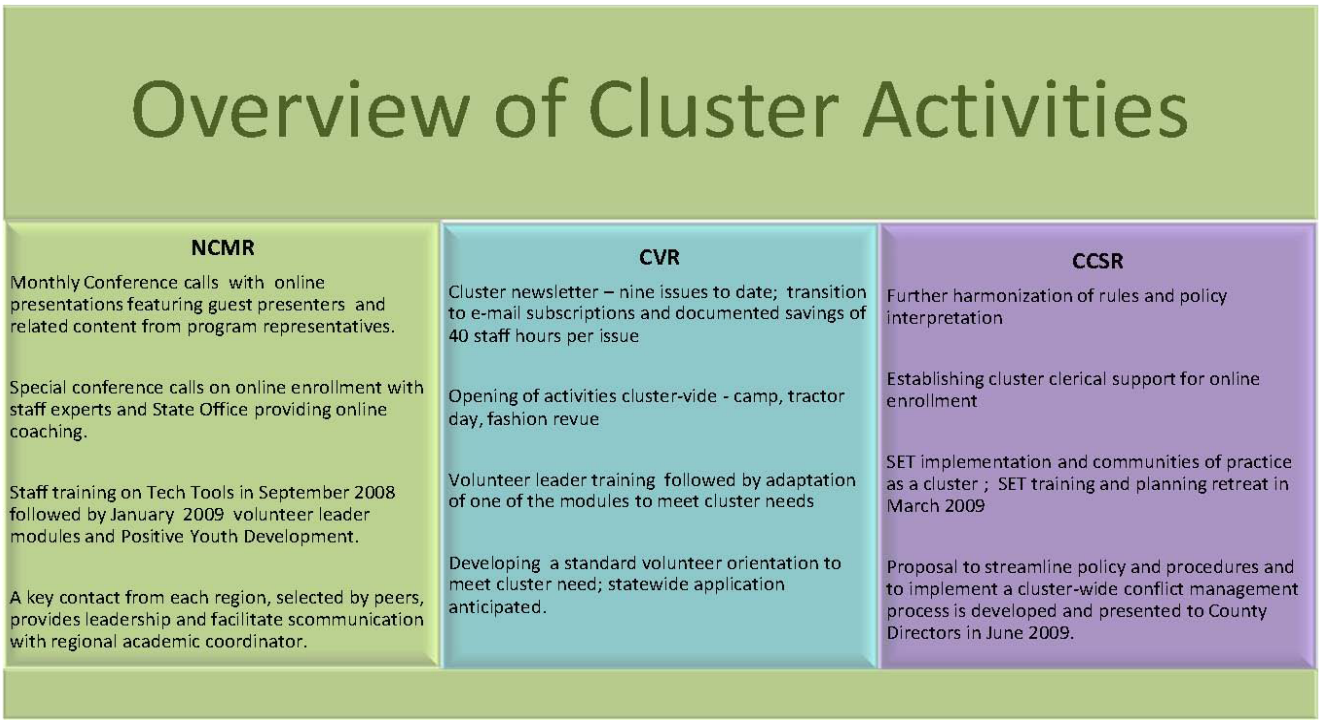
Staff development
In the fall, 4-H Youth Development advisors delivered cluster-specific training on youth characteristics and adolescent development. At the cluster retreat in March, staff and academics were trained to use the water quality testing curriculum. Retreat participants were introduced to a variety of ways to extend the water quality testing curriculum to the volunteers and after school staff who will deliver the curriculum.

Policy consistency
Building on its Year 1 efforts to increase consistency and facilitate access by volunteer and youth to programs and training resources across county lines, the cluster continued to ensure that club management policies and procedures were implemented in a similar manner in all six counties. They also worked with volunteers to harmonize the applicable constitutions and by-laws. San Diego Cooperative Extension provides some clerical support to the rest of the cluster with regard to the online enrollment system.

Cluster-wide programming
Following the launch of the 4-H Science, Engineering and Technology initiative (4-H SET) in September, 2008, the coordinator proposed that the cluster approach the implementation of 4-H SET as a team. Such an approach would facilitate problem-solving, encourage sharing of staff expertise and resources, reduce duplication of effort, and allow volunteers to access 4-H SET programming across county lines.

Cluster-wide volunteer management
By the end of the two-day cluster retreat in March 2009, cluster staff and academics agreed that in order for the 4-H Youth Development Program in the six cluster counties to operate as efficiently and effectively as possible, the cluster would need a master volunteer management plan. Each person then assumed responsibility to develop part of the plan. Academics researched supporting documentation and evaluation strategies and staff compiled their volunteer orientation and training resources. Based on these findings, the cluster prepared a proposal which was presented to the regional director and the six cluster county directors on June 15, 2009. All present at the meeting agreed that the way forward will be for arbitration of volunteer issues and oversight of volunteer movement to be managed at a regional-level. Implementation would be gradual and involve volunteers.

Figure 6: Overview of Cluster Activities (July 2008 - June 2009)



Evaluation Activities in Year 2

The 4-H Pilot Leadership Plan was evaluated by the 4-H Center for Youth Development. While Year 1 evaluation included preliminary insights on impacts of the Pilot, a large emphasis was on the formative findings that would ensure successful Pilot implementation. In Year 2, the focus was on summative impacts. The following evaluation questions guided the study in Year 2.

I. How does county clustering with a cluster coordinator work to;

- Increase communication and consistency across clusters and statewide;
- Increase level of support, competence and job satisfaction of 4-H program representatives;
- Increase cross-county collaboration for reduced duplication and increased efficiency;
- Increase opportunities for advisors to conduct cluster or state level research, evaluation and training; and
- Benefit volunteers and programs?
-

II. What are additional insights that inform successful county clustering with a coordinator role? Specifically,

- What are the differences in the experiences of coordinators in a sub-regional and regional model;
- How feasible is a part-time advisor role as cluster coordinator;
- How does staff statewide, within and outside the clusters perceive the Pilot overall; and
- What are some promising practices and issues to consider when clustering California counties for the 4-H program?

Data that informed findings in Year 2 were from:

- *Surveys from cluster personnel*. 31 program representatives (response rate = 100%); 8 out of 9 advisors responded (response rate= 88%) and 20 out of 27 county directors (response rate = 74%). The surveys in Year 2 predominantly focused on summative impacts of the Pilot, attempting to understand how the Pilot has made a difference to the participating counties from the perspective of the program representatives, advisors and county directors in the three clusters. In this context, the questions to program representatives explored changes in professional development, support received, use of resources, impact on 4-H program and volunteers and overall impressions. Parallel questions for advisors and county directors included their current level of support of the Pilot and the work of the academic coordinator, impacts observed for their program representative and for the 4-H program and overall impressions. Formative aspects of the evaluation included an exploration of how advisors viewed their role in the Pilot and how the Pilot could further support their roles.

- *Telephone interviews with advisors from non-participating counties*. Twelve advisors were interviewed individually by telephone between October and December 2008; the thirteenth advisor was on sabbatical at the time of the interviews. The interview questions were on overall understanding of the Pilot, communication about the Pilot, its progress and impact within clusters and in the non-cluster counties, vision for the future of the Pilot, and overall impressions of the Pilot. Advisors were also asked for their thoughts on the potential impact of participating in a cluster would be on them/their county's 4-H Youth Development Program and about the criteria for an effective cluster.
- *Observations of cluster events*. An evaluator was present for trainings and cluster meetings especially in the CVR and NCMR.) A staff research associate in the CCSR provided notes from meetings in the southern region.
- *Interviews*. In Year 2, ongoing conversation with cluster coordinators, reflection notes from monthly reports and interviews with the Director and Assistant Director at the beginning of Year 2 informed the Pilot evaluation.

Table 5: Survey respondents by cluster

NCMR
- 21 program representatives (100%), 3 advisors (100%), 11 county directors (one outgoing) (about 50%)

CVR
- 4 program representatives (100%), 1 advisor (50%), 4 county directors (80%)[1]

CCSR
- 6 program representatives (100%), 4 advisors and 5 county directors

Quantitative data in Year 2 was analyzed using SPSS software and qualitative information was coded for salient themes.

FINDINGS

Findings from the evaluation are presented in the following sections, namely, perceptions of staff about the benefit of the Pilot, impacts in the areas outlined under desired objectives and additional insights. For all sections, the overall findings are presented along with specific findings by cluster wherever relevant.

Is the Pilot beneficial? Perceptions of cluster personnel

Ninety-four percent (94%) of program representatives agreed that participation in a cluster with an academic coordinator was beneficial. Program representatives mentioned the following benefits - additional training and resources, reduced isolation and increased readiness to call peers for help, having someone to ask questions, feeling supported by the academic coordinator.

"Since the Pilot, my comfort level has increased as far as approaching staff and advisors from other counties and asking for help." - NCMR

"I have more information and resources to offer volunteers." - NCMR

"It is nice to know how other program reps resolve issues." - CVR

"I really felt alone and the State Office was so busy at times. Now I have all the other program reps to talk to in addition to having our cluster coordinator." - CCSR

Slightly more than half of advisors and county directors within clusters had positive overall impressions of the Pilot (5 out of 8 advisors and 11out of 20 county directors). Out of the five advisors who were positive, four changed from a neutral or mix of positive and negative opinion over the course of the Pilot, indicating increased buy-in. One advisor and five county directors were neutral at the end of Year 2. Some of the benefits noted by advisors and county directors were increased staff development opportunities for program representatives and greater communication within the clusters. The following comments capture a range of opinions of those who felt the Pilot was beneficial and those who remained ambivalent about its benefit.

6 This includes a retired and an incoming county director for one of the counties.

"The coordinator and cluster has been a great help in bring our 4-H Youth Development Advisor up to speed and helped build unity among the personnel". - County Director, CCSR

"Without the academic coordinator's support, guidance and training we might be looking for another program representative by now. The Pilot provides needed training and resources and much needed moral support" - County Director, CCSR

"Without it there would be a different CD and no 4-H program in (my county)."– County Director, CCSR

"It has helped to standardize some aspects of the program." – County Director, CVR

"I like the structure and think the role has evolved to become a critical element of the 4-H staffing structure. It has been helpful to providing training, information and resources to the counties." - 4-H YD Advisor, CCSR

"It creates a stronger bond among the counties, increases opportunities for youth and volunteers and possibly increases programs. It provides opportunities for multi-county work." - 4-H YD Advisor, CVR

"I feel they should do these things at the regional or state-level but don't need academic coordinators or clusters. We do this on an informal level regionally and through state advisory committees." - 4-H YD Advisor, NCMR

"Probably for new staff it would be beneficial. Personally, the cluster has done nothing for me. I think it has helped our program rep feel part of a large group, but the County Board of Supervisors don't care about multi counties, they only care that I serve youth here and increase enrollment. If we are to survive in counties we need to be careful that we meet the Supervisors expectations. Otherwise we are out of the county offices and into regional ones." - 4-H Youth Development Advisor, NCMR

There was some variation in the level of perceived benefit in the different clusters. Cluster personnel in the CCSR were most consistently positive at all levels, i.e. program representatives, advisors and county directors. All program representatives and advisors agreed that the Pilot was beneficial and 4 out of 5 county directors were positive about the Pilot and 1 was neutral at the end of Year 2. In the NCMR, 90% of program representatives (19 out of 21) said that participating in the Pilot was beneficial and over 75% of the county directors were positive about the Pilot at the end of year 2. Advisors were either neutral or negative. Overall impressions in the Central Valley Region were either positive or neutral. Issues noted included specific comments about cluster functioning – for instance the large area needed to be covered in the NCMR, or discrepancies in the expectations of the clusters staff of the role of the cluster coordinator in the CVR.

"The Pilot plan can be very positive, especially with the lack of so many Youth Development advisors in our system, but the effectiveness of the coordinators is limited by the large area they must cover." - County Director, NCMR

"I feel that, due to the lack of clarity of the role of the AC, there have been some misunderstandings among all participants in the cluster about what should be expected from the coordinator and what the AC can expect from county staff." - County Director, CVR

Impacts: Progress on Desired Objectives

IMPACT 1: **Increased communication and consistency across clusters and statewide**

Consistent with preliminary findings in Year 1, the Year 2 evaluation suggested an increase in communication at several levels. There were three areas where county clustering with coordinators had an impact on the flow of communication: i) among program representatives in cluster counties, ii) between counties and the state office mediated by the cluster coordinator, iii) between cluster coordinators and the state office. Increased communication has led to greater consistency in program implementation.

Forty-eight percent (48%) of program representatives reported increase in communication with their peers compared

to before the Pilot. This is consistent with interview response in Year 1 where several program representatives noted they contacted staff from other counties within the cluster without hesitation. In addition, in Year 2, several program representatives reported that they now felt more comfortable contacting advisors within and outside their cluster.

Cluster coordinators served as interpreters on program and policy related questions.[2] While a majority of the program representatives reported contacting the State 4-H Office on policy questions, over 60% also kept the coordinators in the loop about the communication. Nineteen percent (19%) of program representatives felt that communication with the State 4-H Office had been enhanced. Consistency in policy interpretation showed a significant improvement with 87% of program representatives indicating that policy was consistent in cluster counties now, compared to 61% who said it was consistent before the Pilot.

Personnel from the State Office, namely the Acting Director agreed that the Pilot had enhanced communication between the state 4-H office and the counties through the regular communication with the coordinators.

"I think it's working very well with the three coordinators. I even, formally and informally use them for feedback. I think ultimately, having a person in those roles would be a huge improvement in our communication, because the person then could take that information, and then tailor it (for program reps), which is very, very critical. So I see this new structure as really being a great opportunity to improve the communications." – Acting Director, 4-H Youth Development Program

Furthermore, regular communication among the cluster coordinators provided them with opportunities to share resources and in turn increase the consistency in operations across clusters. For example, a NCMR survey used to evaluate program representatives status in the area of volunteer management was adapted for use in the CCSR cluster. At the time of writing, the CVR cluster planned to share its standardized volunteer leader orientation package with the CCSR cluster and both clusters would Pilot the package for eventual statewide use.

"The biggest impact is that we are coordinating events. We are also looking to strengthen leader training and have policies the same across the cluster, which will make it easier when members and leaders move across county lines." – 4-H Youth Development Advisor, CCSR

Practices that enhanced communication and consistency
• Use of technology in the NCMR (adobe connect, portal, ANR collaborative tools) which reduced travel time and provided the infrastructure for regular communication among program representatives. • Regular communication among a team of cluster coordinators and the State 4-H Office. • Cluster coordinators serving on key statewide committees. In the second year, all three cluster coordinators served on the 4-H policy committee.

IMPACT 2: **Increased level of support, professional competence and job satisfaction of 4-H program representatives**

County clustering provides program representatives with an intentional structure that encourages peer sharing. In addition access to a cluster coordinator provides a greater level of support and relevant professional development opportunities, both of which were found to decrease isolation and increase job satisfaction.

The majority of program representatives (over 70%) said participating in a cluster with a coordinator had provided more access to training and more information on youth development (See Table 6 and 7). They were now more knowledgeable about program offerings. Almost half of the program representatives felt they could call their peers more readily to ask for assistance. Fourteen out of 31 program representatives, a majority from the NCMR, noted they had been offered new opportunities to lead their peers.

7 Initially two of the coordinators served as interpreters of policy. In the second year, all three coordinators served on the policy committee.

Table 6: Impact of cluster participation on Program Representatives

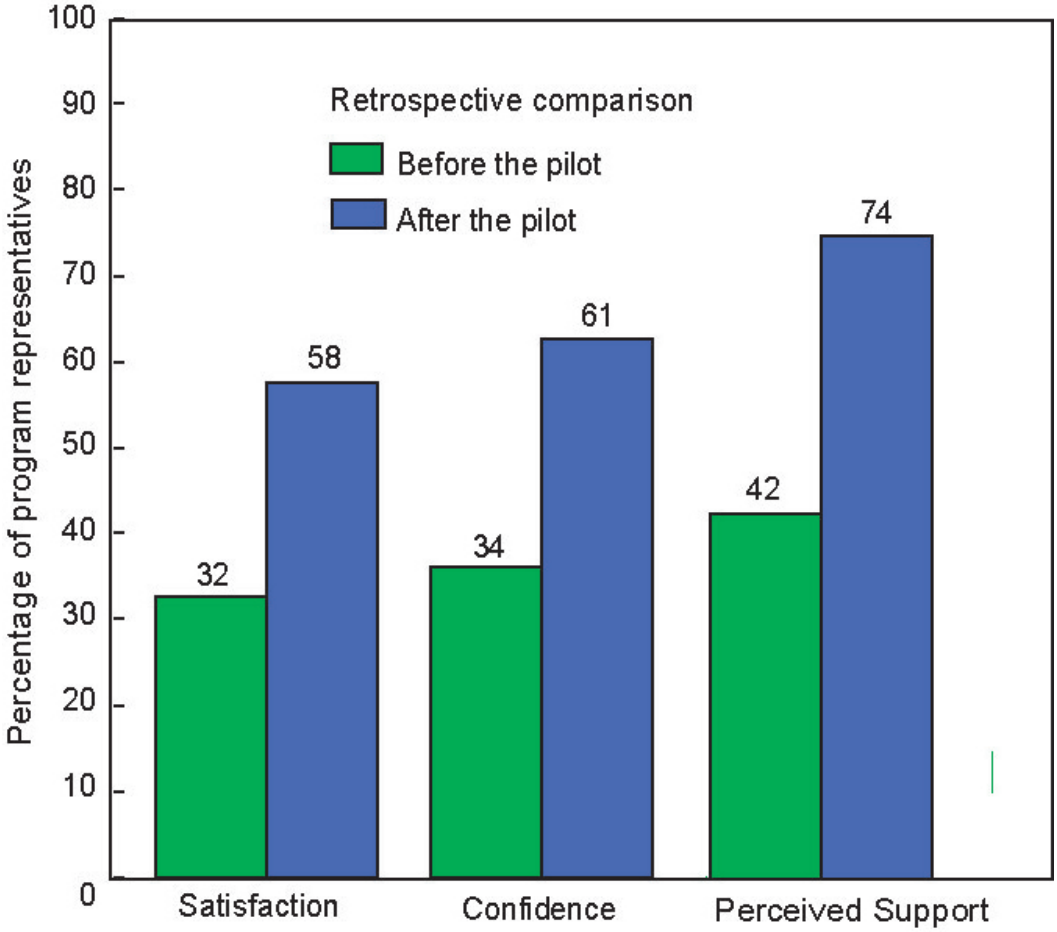
Since participating in a cluster with an academic coordinator	Frequency and percentage (n=31)
I have access to more training	24 (77%)
I have access to more information on youth development	22 (71%)
I am more knowledgeable about program offerings in other counties	22 (71%)
I more readily call my peers for assistance	15 (48 %)
I have been offered new opportunities to lead my peers	14 (45%)
I feel better equipped to handle issues that come up with volunteers	14 (45%)
I feel more confident in my ability to apply 4-H policies and procedures	13 (42%)

Retrospective comparisons on perceived job satisfaction, confidence as a youth development professional and perceived level of support all showed statistically significant positive impact (See Figure 3).

Table 7: Utilization of the services provided by the cluster coordinator

In my cluster, the academic coordinator has	Frequency and percentage (n=31)
Facilitated access to training relevant to my work	27 (87%)
Increased my access to curricula and other resources	21(68%)
Helped with policy interpretation	16 (48%)
Helped resolve a program related issue I faced	10 (32%)
Provided other support (tech tools training, moral support, personal training, quick response time)	12 (37%)

Figure 7: Graph showing the increase in job satisfaction, confidence as a youth development professional and perceived level of support of program representatives (n=31)



Practices that enhanced program representative support
Creating systems of communication and networking for program representatives to share resources with each other. Each cluster created structures for program representatives to communicate with each other. In CVR, program representatives worked as a team, in pairs, or as triads to develop innovations such as the cluster newsletter and the standardized volunteer orientation package. In NCMR and CCSR clusters, communities of practice were initiated to provide program representatives with a peer group for sharing ideas about programs.
Focusing on program representative capacity building and professional development as an initial step. Ensuring that the needs of program representatives are met allow county programs to build needed capacity which then allow smoother cross-county collaboration.
Regular contact among program representatives during regular cluster meetings (face-to-face in CVR and CCSR and via conference calls in NCMR).

IMPACT 3: **Greater cross-county collaboration, and efficiency in use of resources**

The two sub-regional clusters made significant progress in collaborating across county lines. The following are some of the achievements of cross-county collaboration in the CVR and the CCSR clusters.

- A joint 4-H newsletter in the CVR with estimated cost savings of $2500 in staff time for a given year.
- Cluster-level volunteer leader orientation in the CVR which is to be adopted statewide after piloting in the CVR and in the CCSR.
- Cluster-level volunteer leader training in the CVR with the cluster coordinator working in collaboration with the Volunteer Leader Workgroup to deliver Volunteer Leader Digest modules[1].
- Cluster-level planning and implementation of Science, Engineering and Technology programs in the CCSR.
- Initiative to implement a regional volunteer management system in the CCSR.

Practices that enhanced cross-county collaborations
Building trust and camaraderie in the cluster.
Ensuring that all counties benefited from collaboration.
Engaging advisors and, wherever relevant, county directors in the process of planning cross-county collaborations.
Focusing on increased efficiency to reduce staff workload .
Mutually agreed upon need that is universal to all counties.

IMPACT 4: **Increased opportunities for advisors in research, evaluation and training**

One of the aims of the new staffing structure was to free advisors from administrative tasks, however, we did not find evidence that this is occurring. However, we did find that advisors could benefit from reconceptualizing their roles within the cluster and by being involved through increased opportunities for research, evaluation and training.

County clustering with a coordinator has the potential to enhance advisor work, as is seen in the case example of CCSR cluster where all four advisors agreed that the Pilot was an asset to their work. The cluster coordinator in NCMR was able to engage advisors and other personnel statewide in offering training to program representatives. In both the CCSR and the NCMR, the cluster coordinators ensured that the training was relevant to program representatives by providing each presenter with background on the intended audience.

In the CCSR, cluster advisors were directly involved in planning research and evaluation projects in line with the cluster-level program development. For example, one of the advisors was developing an evaluation for SET activities in the cluster.

8 The Volunteer Leader Digest modules are train the trainer workshops for staff and volunteers on key topics relevant to leading projects and working with young people in the 4-H program. For example, topics include Project Planning, Ages and Stages in Children, and Citizenship, Leadership and Lifeskills, to mention a few.

Following are some comments from advisors about how county clustering with a coordinator supported their work as a youth development advisor.

"I think that the best support (the Pilot) offers is that it provides communication of new ideas and best utilizes the expertise of all the staff. It also helps reduce duplication of effort." - 4-H Youth Development Advisor, CCSR

"I believe (the cluster coordinator supports my work through the identification of resources, coordinating training opportunities and being a conduit for the flow of information". – 4-H Youth Development Advisor, CCSR

"It provides opportunities for multi-county work"– 4-H Youth Development Advisor, CVR

"(The Pilot supports) by providing solid professional development to the 4-H program representatives" – 4-H Youth Development Advisor, NCMR

While county clustering can enhance advisor work, this depends on advisor capacity, the size of the cluster and how the role of the advisor is conceptualized statewide. It seems the Pilot benefits advisors, if they are willing to participate and see direct benefit for their counties. For those advisors who were peripherally involved, such as those in the NCMR region, the Pilot project was generally seen as something for program representatives.

The impact of county clustering on advisor work is influenced by the conceptualized role of advisor in the cluster. Following are advisors' perceptions of what the role of an advisor should be in a cluster. It is evident that there needs to be further dialogue in this area.

A 4-H Youth Development advisor should have the following roles at the cluster or state level. Out of 8 advisors:
7…Provide training to program representatives on specific topics;
6... Provide assistance with the development of tools for multi-county management;
5…Provide assistance to the academic coordinators;
4…Participate in the development of new program initiatives;
4…Offer expert advice on the development of research and evaluation initiatives: 4 out of 8;
4… Develop curriculum to meet a specific need: 4 out of 8; and
3…Have a percentage of their work time dedicated to providing support for their cluster.

"The reason that I didn't select "percentage of their work . ." is because I think the cluster is a natural progression of the advisor's role and so it's not necessary to "assign" FTE to it. The cluster is becoming a function of the work". – 4-H YD Advisor, CCSR

"The role of the advisor is not quite clear. Taking care of daily management of the 4-H club is very difficult to do on a cluster-wide basis. Relationships with adults and youth must be built, history must be known, and timely response is a must. This is near impossible to do for more than one county". – 4-H YD Advisor, CVR

IMPACT 5: **Benefit for volunteers and programs**

The Pilot was seen to benefit volunteers and programs indirectly through the enhanced competence and confidence of staff. The Pilot's main impacts were to enhance program representatives' interactions with volunteers, allowing the former to resolve conflict more effectively and to have access to additional resources that would be of benefit to the latter.

Impact on volunteers: 14 out of 31 program representatives agreed that there was impact on volunteers. Most of the impact was indirect, through increased staff capacity and knowledge of resources. For instance one program representative mentioned being able to handle conflict better through the training received. Others talked about new resources that they had been made aware of through their participation in the Pilot that they could now make available to volunteers.

Impact on programs: 24 out of 31 program representatives said that participating in the Pilot had a positive impact on the 4-H program in their county. A majority noted that this was due to the increase in their own capacity, confidence, knowledge and access to resources. Other direct benefits reported had to do with the new cross-county program opportunities for volunteers and youth.

"Prior to the Pilot, there were many boundaries which weren't to be crossed. Now we coordinate volunteer training and cross enroll youth and leaders. We also have good relationships with the other program reps." - CCSR

"As I feel more confident and gain expertise as a result of training, my whole county benefits. I am a stronger program rep." - CCSR

"Members and leaders from other counties sometimes attend our events – events announced in our cluster newsletter" - CVR

When asked whether the cluster format had been beneficial to the 4-H program in their county, 14 out of 20 county directors (70%) who responded to the survey indicated they agreed.

Additional Insights

The following section notes additional insights on the working of the 4-H Pilot Leadership Plan when examining findings by the type of staffing model, the feasibility of a split coordinator role, the role of advisors, and continuing issues to consider.

Both Regional and Sub-Regional Models have Benefits and Issues
Both regional and sub-regional models had benefits and costs. For the purpose of the comparison, CCSR and NCMR were chosen since the clusters had a similar focus on staff development.

Regional model
In the regional model, the regional director had worked with the cluster coordinator to develop a plan that would benefit the entire region. The focus on program representative professional development worked well in a region where many of the staff did not have advisors. The role of the cluster coordinator as facilitator was clear in this region. Coordinating an entire region meant that the coordinator's role was primarily staff development and support; as opposed to leading program development or facilitating cross-county programming. Indeed, in the NCMR region, the pre-existing sub-regional structures largely addressed those needs. While the use of technology facilitated communication with a large audience, it was challenging for the coordinator to ensure that all county directors had a similar understanding of how the cluster operates; furthermore, advisors in the region chose to limit their engagement in Pilot activities.

Sub-regional model
In the sub-regional model in CCSR, only six of the counties in the region participated in the cluster, though events such as the Volunteer Management workshop were open to 4-H staff in the entire region. Cluster-level management and program development was restricted to the cluster and therefore benefited a small group of staff. In this sub-regional cluster, the role of the cluster coordinator was more ambiguous with regard to the level of involvement within each of the counties. Communication was more intense at all levels. Cluster personnel (especially county directors and advisors) were engaged in a way that was harder to achieve at the regional level. Cluster advisors were integral to the planning process and fully identified with the purpose and vision of the cluster. The cluster coordinator in many instances was treated as a regional coordinator by the State Office (personal communication with Assistant, Director, 4-H YDP). This indicates that there may be a need for a regional coordinator even if a model of sub-regional coordination is adopted.

Table 8: Comparing the impact of a regional vs. sub-regional model

Regional clustering (23 counties)	Sub-regional clustering (6 counties)
Regional director integrally involved in planning and envisioning	Regional director less involved in sub-regional cluster vision process
Resources shared across the entire region. All counties in the region benefit to some degree	Counties in the cluster benefit more than other counties who sometimes report feeling left out.
Expectations of coordinator were more realistic in the first year of the Pilot.	Expectations with respect to the level of county involvement was more ambiguous in the first year.
Harder to engage all levels of personnel such as advisors and county directors in cluster level planning.	Advisors and county directors were brought on the same page with more intense communication
Program representatives had more resources available from a larger group of peers.	Program representatives reported benefiting from peer sharing, however from a smaller group of six counties.
Advisors only peripherally involved in cluster activities.	Advisors integrally involved and identified fully with cluster efforts.

Insights on the Role of Cluster Coordinator

In Year 2, there was increased clarity on the range of functions that the three coordinators took on in line with their proposed roles (see Table). In addition there were insights gained on the feasibility of a dual role, i.e. advisor taking on a part time role as coordinator.

Increased clarity on coordinator functions

In Year 2, a majority of advisors (6 out of 8) and county directors (13 out of 19) said they were clear on the role of cluster coordinators. Among advisors, those who strongly agreed commented that they liked the structure and thought the role had evolved to become a critical element of the 4-H staffing structure (with respect to providing training, information and resources to the counties). They felt well-informed and up to date with cluster activities. Those who agreed said the group has worked to clarify the role as it has evolved. Those who disagreed said the role was not completely clear when it comes to conflict resolution and personnel issues. Another area of continued ambiguity was the level of county level support that the coordinator is expected to provide. In meeting with regional directors on clarifying lines of authority, was made clear that within the current administrative structure, coordinators' roles are characterized by facilitation and programmatic leadership rather than supervision or direct management. What this means in terms of actual practice continues to evolve as cluster coordinators were in constant dialogue with each other and with advisors and county directors in their clusters to reach a shared understanding of their roles.

Table 9: Proposed role of cluster coordinator[2]

Communication
• Assure communication cluster-wide. • Communicate with County Directors on an on-going basis. Attend occasional regional meetings of County Directors and educate County Directors on positive youth development. • Act as first point of contact for Program Representatives, County Directors, or Regional Director. The state 4-H office can be contacted directly but the answer should be copied to the cluster Coordinator.
Policy
• Help Program Representatives with policy interpretation and alert cluster personnel, including County Directors of new policies.
Program Support
• Be a resource for Program Representatives in club operations and other program delivery modalities (ex: after-school programs, camp programs). • Help develop strategies to support county programs during personnel transitions. • Work with cluster staff to reduce redundancy in program administration. • Work together to secure funds for new programs.
Training, Resources and other Support for Program Representatives
• Help Program representatives identify professional development needs, coordinate trainings and facilitate access to information resources. • Share best practices and introduce new curriculum to Program Representatives. • Help Program Representatives identify research needs of their 4-H programs and communicate these to academics. • Facilitate mentoring arrangements for Program Representatives without an Advisor.
Recruitment and Orientation
• Be engaged in the hiring process for new Program Representatives or Advisors in cluster to ensure personnel have the appropriate skills and complement the skill sets of others in cluster. • Provide orientation of Advisors, Program Representatives and County Directors in cluster.

Feasibility of the dual roles of advisor and coordinator

During the two years of Pilot implementation, an advisor from each region took on an additional role as part-time coordinator. When sharing their experience with this dual role, all three coordinators were quite consistent in their views: a fifty percent appointment has associated benefits and challenges.

9 Developed based on interview responses of expectations of academic coordinators by cluster personnel. The three academic coordinators discussed each expectation at a Pilot Leadership Team meeting in May 2008 and assessed appropriateness based on their experience in the first year.

The main benefit was having experienced academics who were a) familiar with the 4-H program; b) had the capacity to orient county directors and advisors to the cluster format; and c) provide the necessary support to program representatives, particularly those without an advisor. There was also a cost benefit in that ANR did not need to hire new academic coordinators.

The main challenge associated with the split time arrangement were that it was overwhelming for advisors to do effectively accomplished both functions to their satisfaction; even with the support of the staff research associates.

Table 10: Benefits and Challenges of a dual advisor-coordinator

Benefits	Challenges
More cost effective than a full-time academic coordinator.	Dual role is overwhelming as far as devoting ample time to both the coordinator and the advisor tasks.
Advisors who took on the coordinator role were experienced academics who were very familiar with the 4-H program.	County needs to have adequate support if the advisor is engaged in cluster-level activities.

The person who does the academic coordinator work has to know that it will take a lot of time. There is just going to be a lot more than you have time. I would not recommend that the position be split between county advisor and academic coordinator – Jane Chin Young, NCMR coordinator

My role in this split assignment is not livable in the long run. I think we need to look at more regional responsibilities or roles to go along with this and make it a full- time position outside an individual county. – Steve Dasher, CCSR coordinator

Perspectives of Other Advisors

In order to gain additional insights from counties not participating in the Pilot, we interviewed 4-H Youth Development Advisors outside of the CVR and CCSR clusters. Twelve advisors were interviewed individually by telephone between October and December 2008; the thirteenth advisor was on sabbatical at the time of the interviews. The interview questions were on overall understanding of the Pilot, communication about the Pilot, its progress and impact within clusters and in the non-cluster counties, vision for the future of the Pilot, and overall impressions of the Pilot. Advisors were also asked for their thoughts on the potential impact of participating in a cluster would be on their county's 4-H Youth Development Program and about the criteria for an effective cluster.

There was good understanding among all those interviewed about the pilot plan and a majority (8 out of 12) felt that they had received sufficient communication about the Pilot. However, understanding of how the Pilot was implemented at the cluster-level varied greatly among the interviewees. Equally varied were the opinions on the impact and progress of the Pilot in each cluster (5 were positive, 5 were neutral and 2 were negative). Impacts noted included increased training opportunities for non-cluster staff. Among the challenges cited were the dual-role of the academic coordinator, the size of the NCMR cluster, the lack of clarity on the roles, and the need for a common outcome for all three clusters.

In looking at future clusters and their participation in one, the non-cluster advisors pointed to potential benefits such as being freed up to pursue academic endeavors, doing joint programming and introducing new projects at the cluster-level, and having volunteer orientation and training serve multiple counties to reduce duplication of effort. Concerns related to primarily to the cluster coordinator role: difficulty recruiting unless there was a strong middle management structure in their county, overlap in role in counties with cluster advisors, loss of contact with local players, and the role could become a "dump and run" with the coordinator being saddled with the work other personnel will not do.

The following were the suggested criteria for future clusters

- Close proximity of counties (though not strictly along regional lines)
- High level of buy-in with agreement on responsibilities, staff supervision, and how resources are to be shared prior to cluster formation
- Flexibility in clustering based on type of clientele served, size of counties and programs and types of 4-H programs being done, supported by the use of technology for communication
- Strong leadership from a coordinator who is not tied to any one county

- Full-time program representatives available in each county
- Advisor involvement in cluster could be based on research to address youth development issues within clusters or other multi-county arrangements

DISCUSSION: IMPLICATIONS AND RECOMMENDATIONS

Based on the progress in the last two years, we believe that county clustering with a coordinator is an appropriate model especially in times of economic constraints. The California experience is in line with the experience in other states with respect to the benefits as well as some of the issues identified. County clustering can provide the necessary support to field staff, provide impetus for collaboration, and lead cluster coordinators to create, adopt and diffuse new innovations. Accomplishments and achievements from Years 1 and 2 have shown that county clustering with a coordinator has been beneficial especially for staff, and to a lesser extent for academics. County clustering with a cluster coordinator enhances the potential for innovative programming and increased efficiency.

During the last two years, we have identified the barriers and issues to successfully implementing a cluster model. These include structural issues such as the variability in program representative positions and organizational issues such as clarifying roles and new lines of communication. While a majority of staff are optimistic and support a new model of staffing, almost half the county directors and advisors did not see the Pilot as beneficial. Uneven buy-in right from the onset can explain some of this. It is also possible that two years may not be long enough to all to feel the effects of such a transition. As identified in other states, the transition into a new staffing structure takes time and willingness on the part of all concerned to adopt and embrace a new way of operating.

Based on the above experiences, the following suggestions have been put forth by the Pilot Leadership Team for a cluster model. Therein are associated suggestions based on what has worked well that can be used to guide further county clustering for California's 4-H Youth Development Program.

- **Cluster California counties with cluster leadership provided by an academic.** Based on the findings in the past two years, we believe that county clustering can be an effective way to administer 4-H in California.
- **Adopt a regional cluster model, with formal or informal sub-regional groups.** While both the sub-regional and regional models were effective in achieving their goals, the regional model of county clustering has been put forth as the most cost effective model in a time of budget constraints. A regional model is effective especially when staff development and capacity building is the primary focus. In addition, formal or informal sub-regional structures where smaller groups guided by advisors and/or key contacts (i.e. experienced program representatives) would work well to support a regional structure.
- **Determine a system of regional leadership provided by a 4-H youth development advisor or other academic.** Based on regional staffing situations several scenarios are possible for regional coordination. An advisor with a split time role as regional coordinator, on a three year rotational cycle can be feasible if they are adequately supported in their advisor role and have realistic expectations as a coordinator. While basing the coordinator out of county was not tested in the evaluation, this might be explored further. A sustainable system for recruiting cluster coordinators, including appropriate incentives needs to be further developed.
- **Provide opportunities for advisors to share their expertise statewide and continue to re-conceptualize the role of a 4-H youth development advisor in a new staff structure.** Sub-regional clusters were particularly effective when advisors were integrally involved in planning of multi-county projects. In addition, coordinators were able to call on advisors on areas of their specialty for training program representatives. County clustering is especially effective when coupled with advisor specialization, as seen in other states. The role of advisors statewide and within a cluster should be conceptualized to complement the role of cluster coordinator.
- **Cluster coordinators should work in a unified way with programmatic leadership from the 4-H State Office.** A team of cluster coordinators working with the State Office proved to be a powerful model for statewide consistency.
- **Communicate new lines of communication between county personnel, cluster coordinators and the 4-H State Office to all personnel.** Fully informing all cluster personnel of expectations and roles at the start of the Pilot would have ensured greater clarity and buy-in on the part of all cluster personnel as well as accelerated progress in certain areas, such as the ability of cluster coordinators to support program representatives on policy and programming.
- **Revisit the concept of a committee to reconcile 4-H program representative status from a statewide perspective.** The effectiveness of a cluster model (regional or sub-regional) impinges on successfully hiring and retaining field staff

to oversee the 4-H Youth Development Program in the counties. Novel ways of funding these positions need to be explored parallel to the transition to a cluster model.

Elements for successful clustering – a guide based on promising practices

* Ensure buy-in by identifying a common vision or need for all counties in the cluster.
* Clarify the role of the cluster coordinator with all personnel in the cluster. Gain consensus on expectations.
* Build a team of cluster coordinators that assures frequent communication among cluster personnel and the 4-H state office.
* Have cluster coordinators serve on statewide committees to assist them as they interpret policy and answer program related questions.
* Use available technology for communication whenever possible and appropriate. Establish systems for staff to communicate with each other.
* Engage 4-H youth development advisors in planning and contributing to cluster-level activities (research, evaluation, training and program development).

CONCLUSION

During the two years that the 4-H Pilot Leadership Plan operated, we learned a great deal about the effectiveness of a new model for staffing 4-H. Program staff, in particular, benefit from a system where they have contact with their peers and access to a resource person such as a cluster coordinator. In addition, clustering represents a new way of operating, encouraging cluster personnel to devise innovative strategies for sharing resources or providing new opportunities to volunteers and youth through increased cross-county programming.

The Plan was a new way of operating and a transition from a county-based system to one that embraces a vision that may encompass several counties or an entire region. Clustering was a significant departure from the county-based extension system that has been in place for decades. Nonetheless, the Pilot paved the way for further restructuring. We trust that the insights gained during the Pilot will inform the thoughtful planning of future county clustering efforts and provide the basis for a successful and sustainable staffing structure for the 4-H Youth Development Program.

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4-H cyd CENTER FOR YOUTH DEVELOPMENT **SPECIAL REPORT**

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