National 4-H Equity Design Team

Strategic Planning
Report to ECOP 4-H Leadership Team

January 2021

Building a 4-H Program with *Opportunity4All*

TABLE OF CONTENTS

Letter to ECOP 4-H Leadership Committee
Executive Summary
Report to ECOP 4-H Leadership Committee

January 2021

Dear Members of the ECOP 4-H Leadership Committee,

On behalf of the 4-H Equity Design Team, we are pleased to present the following report and recommendations, "Becoming a 4-H Program with *Opportunity4All*."

National 4-H Council launched *Opportunity4All* in 2020, a campaign to eliminate the opportunity gap for young people across the country. The campaign boldly states that opportunity should not be pre-determined by any person's zip code, ethnicity, skin color or income. While the campaign works to mobilize youth and widespread support to address the widening opportunity gap, the following 4-H Equity strategic plan identifies the internal systemic changes that are needed at the national level to support the vision and leverage state-led equity initiatives.

In January 2020, when this group of Extension directors and 4-H leaders came together to create a blueprint for addressing the equity and diversity needs of our 4-H youth development programs and to inspire and guide culture change across the extension system, we knew the work was absolutely vital and deeply challenging. Even so, none of us imagined the historic events that were about to unfold in the months ahead, magnifying the growing economic and racial inequality facing our youth, their families and communities.

The coronavirus pandemic dramatically changed school life, family life and community life for our youth, widening the opportunity gap and threatening an entire generation; the tragic killing of George Floyd and countless other black men and women sparked protests and unrest that rocked our country and communities; elections amplified the polarized political climate; and issues of inequality and systemic racism continued to be flashpoints for a divided country.

It was in this environment that we came together virtually over the course of ten months, meeting twice a month in our Zoom room to share insights from members' state assessment interviews, to review research materials, to discuss issues of systemic racism, to learn about relevant frameworks and to dig deeper into ourselves in order to build trust with one another and have the necessary difficult conversations.

In short, we challenged ourselves to do what we are asking of all 4-H youth, staff, volunteers, administrators and partners - to come together as one 4-H youth development organization to look with fresh eyes, listen with open ears and respond with open hearts as we examine our ability to build a more inclusive, diverse and equitable organization that is committed to addressing the opportunity gap among all young people.

To do this, we will need to work together to address questions such as the ones we identified in our discussions about Inclusive Excellence:

- *What behaviors and actions will create a 4-H environment in which all staff, volunteers and youth feel welcomed and included?*

- *What curriculum, applied research, programs and opportunities will engage and promote collaboration with first generation youth as inclusively and equitably as fourth generation youth?*
- *What education and training will support staff and volunteers in being culturally responsive as they engage youth?*
- *What policies, procedures, resources, indicators and accountability mechanisms will sustainably drive equitable and inclusive 4-H operations?*
- *What practices and processes will support recruiting, retaining and developing staff, volunteers and youth who value and create diversity, equity and inclusion throughout 4-H?*
- *What new and existing partnerships will 4-H need to develop to improve and sustain positive youth development for all youth?*

Effectively addressing questions such as these requires a systemic approach to change. As Peter Senge, John Kania and Mark Kramer identify in [The Waters of Systems Change](#):

- Systems change is about advancing equity by shifting the conditions that hold a problem in place.

- To fully embrace system change, organizations should be prepared to see how their own ways of thinking and acting must change.

- Shifts in system conditions are more likely to be sustained when working at three different levels of change: explicit, semi-explicit and implicit.

- Real and equitable progress requires exceptional attention to the detailed and often mundane work of noticing what is invisible to many.

With systems-level change in mind, we embarked on a strategic planning process to create a shared practical vision, name barriers to the vision, and identify strategies to address the barriers and achieve the vision. Implementation and action plans will be created by implementation teams once the recommendations are endorsed and the work teams are formed.

During the strategic planning work sessions, we identified the following six strategic directions that we must address if we are to achieve our goals. We later added a seventh strategic direction to ensure that we monitor and evaluate our work nationally and locally.

1. **Conduct ongoing critical organizational assessments** to identify where we are, how we are progressing and what changes need to be supported
2. **Recruit, retain and develop youth development professionals** who exhibit intercultural competence
3. **Clarify and define governance and leadership accountability** at national, state and local levels, to ensure the necessary support for 4-H programs
4. **Develop and strengthen new and existing partnerships** to ensure that our partners reflect a rich diversity of interests and communities

5. **Diversify funding streams** to increase opportunities and support equitable distribution of resources across a diverse population of youth

6. **Incorporate diversity, equity and inclusion principles into programs** to ensure high quality youth development opportunities for all youth

7. **Develop data governance and measurement principles and infrastructure** to support data driven decision-making

Implementing these nationally supported strategies will take time and collective effort to engage current stakeholders and staff while also engaging new and diverse youth, volunteers and staff across our state 4-H programs.

Systems change leader, John Kotter offers a model for organizational change that works with current systems and structures while building an agile network that drives change through many people in many places. Kotter outlines eight principles for systems change that may be helpful for 4-H as we move forward:

- Create a sense of urgency around a big opportunity
- Build and evolve a guiding coalition
- Form a change vision and strategic initiatives
- Enlist a volunteer army
- Enable action by removing barriers
- Generate (and celebrate) short-term wins
- Sustain acceleration
- Institute change

A model such as this one will be important for successful systemic change. We must honor the people and programs that have been a part of 4-H for over 100 years, while creating a system that authentically welcomes and engages first generation youth, staff and volunteers.

Together, we must all ask ourselves: *If not now, when? If not us, who?*

We are honored to serve as co-chairs for this passionate and dedicated team of Extension and 4-H leaders who share a deep commitment to the youth of today and tomorrow who will benefit from this legacy work. On behalf of the 4-H Equity Design team, we submit this report and look forward to discussing these recommendations and moving forward with next steps.

Sincerely,

4-H Equity Design Team Co-Chairs

Jon Boren	Andy Turner
Extension Director	New York State 4-H Program Leader
New Mexico State University	Cornell University

EXECUTIVE SUMMARY

In 2020, the ECOP 4-H Leadership Committee and the ECOP 4-H Equity Planning Team charged a National 4-H Equity Design Team to take a deep look at the 4-H program and the barriers to change and innovation that must be addressed in order to achieve the goals identified in the 4-H "Opportunity Statement."

4-H EQUITY DESIGN TEAM

This 4-H Equity Design Team included Extension directors and 4-H program leaders representing the national regions and members of the ECOP 4-H Planning Committee. Dr. Dorothy McCargo Freeman, director of diversity, equity and inclusion for the National 4-H Council, brought together a facilitation team to lead the strategic planning process, share expertise about the Inclusive Excellence framework and ensure that the plan included actionable metrics and indicators.

4-H OPPORTUNITY STATEMENT

The 4-H Opportunity Statement paraphrased and in summary states:

We believe that when we build a more inclusive, diverse and equitable organization, all 4-H members will excel in social mobility and communities will thrive.

We are committed to:
- *Reaching 10 million youth who fully reflect the demographics and social conditions of the nation, by 2027*
- *Providing opportunities for all 4-H youth that are grounded in Positive Youth Development*
- *Embracing the rich diversity of the youth, families and communities that comprise our nation*
- *Working to close the widening gap in wellbeing and economic prosperity for youth and communities*

INCLUSIVE EXCELLENCE FRAMEWORK

ECOP 4-H Leadership asked the 4-H Equity Design Team to use the [Inclusive Excellence Framework which was developed by the American Association of Colleges and Universities](#) to help organizations infuse diversity, equity and inclusion into the very core of all organizational functions.

The Inclusive Excellence framework requires organizations to describe goals around diversity, equity and inclusion in specific and measurable ways that are tied to strategic priorities. Committing to clear metrics and indicators helps to ensure that necessary change is monitored and supported by actions.

STRATEGIC PLANNING FOCUS

To address the charge, a five-part strategic planning process was used to address the question:

> *What can Cooperative Extension do through its 4-H program by 2027 to increase positive youth development opportunities for all youth; ensure that 4-H youth participants reflect the diversity of our communities; and increase our national reach to 10 million youth?*

STRATEGIC PLANNING PROCESS

In preparation for strategic planning work sessions, the 4-H Equity Design Team spent several meetings reviewing and discussing research and resources addressing racial equity and systemic racism, Inclusive Excellence framework, and positive youth development.

The team then completed three virtual work sessions to 1) create the practical vision, 2) identify the barriers to the vision and 3) name strategic directions that will address the barriers and achieve the vision. Implementation planning is the final step of the strategic planning process and will be completed by the Implementation teams once they are approved and launched.

STRATEGIC PLANNING SUMMARY

1) **Creating a Practical Vision**
   During the work session to create a shared practical vision, the team addressed the question, "*What do we want to see in place in 6 years as a result of our actions?*"

   They identified that in 6 years, as a result of their actions, 4-H will have:
   - Increased access, equity and opportunity for youth through a variety of 4-H experiences
   - Diverse and culturally competent 4-H professionals and volunteers
   - Equitable policies and procedures
   - New national partnerships that help us reach the goal
   - Strategic, sustainable resource alignment
   - Culturally responsive 4-H marketing
   - A shared mental model of 4-H across the country
   - Programs addressing issues of social justice

2) **Identify the Barriers to the Vision**
   During the next work session, the team addressed the question, *"What is blocking us from moving toward our vision?"*

They identified the following barriers to the vision:

- Unclear and inconsistent local, state and national leadership and authority
- We are stuck in yesterday
- 4-H reflects dominant white privilege culture
- Difficulty hiring and retaining quality and culturally competent staff
- Limited and inequitable resource capacity, distribution (federal, state, county)
- Potential conflicts across new and old partnerships

3) **Identify New Directions and Strategies**

During the next work session, the team addressed the question, *"What innovative, substantial actions will deal with the obstacles/barriers and move us toward our vision?"*

They identified the following strategic directions:

- Conduct ongoing critical organizational assessments
- Recruit, retain and develop youth development professionals
- Clarify and define governance and leadership accountability
- Develop and strengthen new and existing partnerships
- Diversify funding streams
- Incorporate diversity, equity and inclusion principles into programs
- Develop data governance and measurement principles and infrastructure

4) **Develop First Year Implementation and Action Plans**

Implementation planning is the final step of the strategic planning process and will be completed by the Implementation teams once they are approved and launched.

RECOMMENDATIONS for NEXT STEPS

JANUARY- MARCH 2021

- Submit the report for review, discussion and endorsement with:
  - ✓ ECOP 4-H Leadership Committee
  - ✓ 4-H Program Leaders

MARCH - MAY 2021

- Identify staffing support needed for the work teams
- Name members and launch 4-H Equity Oversight Committee and 7 Work Teams

JUNE - DECEMBER 2021

- Host implementation planning work session for Oversight committee and 7 work teams
- Develop first-year implementation and action plans
- Establish initial metrics and indicators
- Host quarterly plans of work meetings to coordinate all efforts
- Communicate with broader organization

4-H EQUITY DESIGN TEAM
Report to ECOP 4-H Leadership Committee

In 2020, the ECOP 4-H Leadership Committee and the ECOP 4-H Equity Planning Team charged a National 4-H Equity Design Team to "take a deep look at the 4-H program and the barriers to change and innovation that must be addressed in order to achieve the goals identified in the 4-H Opportunity Statement."

4-H EQUITY DESIGN TEAM

This 4-H Equity Design Team included Extension directors and 4-H program leaders representing the national regions and members of the ECOP 4-H Planning Committee. Dr. Dorothy McCargo Freeman, director of diversity, equity and inclusion for the National 4-H Council, brought together a facilitation team to lead the strategic planning process, share expertise about the Inclusive Excellence framework and ensure that the plan included actionable metrics and indicators.

ECOP 4-H Planning Committee Members	
ECOP 4-H Members and Design Team Co-Chairs	**Jon Boren,** Extension Director, New Mexico State University
	Andy Turner, New York State 4-H Program Leader, Cornell University
National 4-H Council	**Dorothy McCargo Freeman**, Director, Diversity, Equity & Inclusion
	Andy Ferrin, Senior Vice President, Chief Strategy Officer
Access, Equity and Belonging Committee	**Nia Imani Fields**, Maryland 4-H Program Leader, University of Maryland
	Fe Moncloa, 4-H Youth Development Advisor, University of California

Region	Extension Directors	4-H Program Leaders
1890s	**Vonda Richardson** Florida A&M University	**Manola C. Erby** Alcorn State University
North East	**Brent Hales** Pennsylvania State University	**Sarah Kleinman** University of Vermont
North Central	**Gregg Hadley** Kansas State University	**Lupita Fabregas** University of Missouri
South	**Laura Stephenson** University of Kentucky	**Rachel Welborn** Southern Rural Development Center
West	**Ivory Lyles** University Nevada	**Lynn Schmitt-McQuitty** University of California

Facilitation Team
Kevin McDonald, Vice President, Diversity, Equity & Inclusion, University of Virginia
Aimee Viniard-Weideman, Leadership & Community Engagement Specialist, Iowa State University
Tara Warne-Griggs, Evaluation Specialist, Warne-Griggs Consulting

4-H OPPORTUNITY STATEMENT

The 4-H Opportunity Statement (Attachment A) paraphrased and in summary states:

We believe that when we build a more inclusive, diverse and equitable organization, all 4-H members will excel in social mobility and communities will thrive.

We are committed to:
- *Reaching 10 million youth who fully reflect the demographics and social conditions of the nation by 2027*
- *Providing opportunities for all 4-H youth that are grounded in Positive Youth Development principles*
- *Embracing the rich diversity of the youth, families and communities that comprise our nation*
- *Working to close the widening gap in wellbeing and economic prosperity for youth and communities*

STRATEGIC PLANNING FOCUS

To address the charge to the team, a five-part strategic planning process was launched to address the question:

> **What can Cooperative Extension do through its 4-H program by 2027 to increase positive youth development opportunities for all youth; ensure that 4-H youth participants reflect the diversity of our communities; and increase our national reach to 10 million youth?**

INCLUSIVE EXCELLENCE FRAMEWORK

The ECOP 4-H Leadership Committee asked the design team to consider the Inclusive Excellence framework and its use of metrics and indicators in the development of the plan and recommendations. Dr. Kevin McDonald, vice president of diversity, equity and inclusion at University of Virginia, and evaluation specialist Tara Warne-Griggs were invited to participate in the planning process to share their experience in using the Inclusion Excellence framework in university and community settings.

Inclusive Excellence is a metric driven framework for diversity, equity and inclusion strategic planning developed by the Association of American Colleges & Universities to integrate quality improvement philosophy and practices with diversity, equity and inclusion goals and strategies.

The Inclusive Excellence framework requires organizations to describe goals around diversity, equity and inclusion in specific and measurable ways that are tied to strategic priorities. Committing to clear metrics and indicators helps to ensure that necessary change is monitored and supported by actions.

STRATEGIC PLANNING PROCESS

Dr. Freeman invited Aimee Viniard-Weideman, leadership and community engagement specialist with Iowa State University Extension, to facilitate the strategic planning process and prepare the final report and recommendations.

The team used the Technology of Participation's Strategic Planning process, developed by the Institute of Cultural Affairs. This participatory process is an integrated approach to strategic planning that results in strong consensus around a realistic, achievable, measurable plan.

As imaged in Figure 1 below, participants work together to:
1. Paint a picture of the current reality, including internal and external trends
2. Creatively visualize and come to agreement around their ideal future
3. Honestly confront their most stubborn blocks to success
4. Align around powerful, innovative shared intentions
5. Define measurable goals
6. Commit to accountable plans of action
7. Achieve consensus around a realistic, achievable, measurable plan
8. Actively manage quarterly and annual progress

Figure 1. Technology of Participation Strategic Planning process

INVENTORY of TRENDS and CURRENT REALITY

In the first phase of the strategic planning process, the 4-H Equity Design Team reviewed and discussed research reports and resources addressing economic disparity, racial equity and systemic racism, Inclusive Excellence framework and positive youth development. The materials included:

- White Fragility, Robin D'Angelo
- Inclusive Excellence Framework (+ 4-H questions)
- 4-H Laboratory of Learning, University of Minnesota
- 4-H Equity Strategy Planning Materials, Bridgespan
- From Context to Outcomes: A Thriving Model for 4-H YD Programs, Mary Arnold
- Annie Casey Economic Disparity and Job Mobility
- Literature Review: Exploring 4-H Thriving through an Equity Lens, Nia Imani Fields
- The Diversity and Inclusion Revolution
- National 4-H Council Strategic Plan
- NIFA 4-H Strategic Plan

STATE ASSESSMENTS

Design team members were asked to conduct self-assessments (ATTACHMENT B) in their states to understand how their state's 4-H program leverages and impedes inclusion, diversity and equity.

They were asked to select five people in their state and spend 30 to 45 minutes interviewing them about questions related to the Inclusive Excellence Framework. When choosing the people to talk to, they were asked to consider the following:

- *Who are the innovators in your state around inclusion, diversity and equity?*
- *Who is more resistant to change related to inclusion, diversity and equity?*
- *Who has left your 4-H program and would it be beneficial to talk with them?*
- *Have you included people who occupy a variety of roles: volunteers, staff members, county commissioners, youth leaders, university partners?*

4-H Equity Design team members shared the following reflections following their state interviews:

"The state assessment really showed me that both staff and volunteers don't really see the challenges or hurdles we need to overcome to ensure everyone is welcome in our programs. I heard over again, that we had not issues since we have one or two diverse individuals successfully participating in and accessing our programs. There is a bit of tokenizing going on that needs addressing."

"County 4-H staff spoke of the pressure to continually serve existing audiences in the same ways as in the past (such as club models and livestock programs) while meeting expectations to engage new audiences that may not find these past options as appealing. This raises the

question of whether a new model of service and/or membership may be necessary to reach new goals and provide new opportunities to engage more diverse participation."

"Barriers to equity are experienced at multiple levels and are entrenched in the system. A director may espouse "equity" to peers while also constricting 4-H agents from engaging with marginalized audiences. One interviewee reflected on the requirement for all search committees to learn about implicit bias and how it had little to no effect on the hiring practices. One-shot educational programs have limited impact on organizational change."

STRATEGIC PLANNING

After working together to understand the current reality and trends impacting 4-H, the team completed three work sessions to 1) create the practical vision 2) identify the barriers to the vision and 3) name strategic directions that will address the barriers and achieve the vision. The results of those sessions are outlined below and the results are furthered detailed in the attachments.

PRACTICAL VISION

The practical vision session created space for the team to share their ideas, deepen their shared understanding of each other's ideas and move toward consensus as they addressed the question, "*What do we want to see in place in 3-5 years as a result of our actions?*" (Attachment D) shows the results of the work session, which is summarized below.

PRACTICAL VISION
In 3-5 years, as a result of our actions, we will experience …   ▪ Increased access, equity and opportunity through a variety of 4-H experiences   ▪ Diverse and culturally competent 4-H professionals and volunteers   ▪ Equitable policies and procedures   ▪ New national partnerships that help us reach the goal   ▪ Strategic, sustainable resource alignment   ▪ Culturally responsive 4-H marketing   ▪ Shared mental model of 4-H across the country   ▪ Programs addressing issues of social justice

BARRIERS TO THE VISION

After identifying the vision, the real issues facing the organization became more apparent. During the next session, the team identified the underlying contradictions to achieving the vision. To name the root causes, the team addressed the question, *"What is blocking us from moving toward our vision?"* (Attachment E) shows the results of the work session, which is summarized below.

<table>
<tr><td>BARRIERS to the VISION</td></tr>
<tr><td>

These underlying contradictions block us from achieving the vision …

- Unclear and inconsistent local, state and national leadership and authority
- We are stuck in yesterday
- 4-H reflects dominant white privilege culture
- Difficulty hiring and retaining quality and culturally competent staff
- Limited and inequitable resource capacity and distribution (federal, state and county)
- Potential conflicts across new and old partnerships

</td></tr>
</table>

STRATEGIC DIRECTIONS

During this session, the team identified strategic directions that answer the question, *"What innovative, substantial actions will deal with the obstacles/barriers and move us toward our vision?"* Attachments G-L show the results of the work session, which is summarized below. In addition, the team added a seventh strategic direction to monitor and evaluate efforts, nationally and locally.

<table>
<tr><td>STRATEGIC DIRECTIONS</td></tr>
<tr><td>

To address the barriers and achieve the vision, we need to …

1. **Conduct ongoing critical organizational assessments** to identify where we are, how we are progressing and what changes need to be supported

2. **Recruit, retain and develop youth development professionals** who exhibit intercultural competence

3. **Clarify and define governance and leadership accountability** at national state and local levels, to ensure the necessary support for 4-H programs

</td></tr>
</table>

4. **Develop and strengthen new and existing partnerships** to ensure that our partners reflect a rich diversity of interests and communities

5. **Diversify funding streams** to increase opportunities and support equitable distribution of resources across a diverse population of youth

6. **Incorporate diversity, equity and inclusion principles into programs** to ensure high quality youth development opportunities for all youth

7. **Develop data governance and measurement principles and infrastructure** to support data driven decision-making

METRICS and INDICATORS

A metric driven approach that includes quantitative metrics and qualitative indicators will allow 4-H to clearly set, monitor and communicate diversity, inclusion and equity goals and strategies that lead to substantial and sustained impact. Metrics and indicators for the equity goals and for each of the strategic directions in the 4-H Equity plan will be defined by the implementation work teams. Examples are outlined below and in greater detail in Attachment N:

Audience	Examples of Audience Metrics
Youth	- Enrollment - Retention in 4-H - Connections to community - Self-reported sense of self - Self-reported sense of belonging
Staff, Volunteers and Leadership	- Demographics - Participation in DEI training - Retention - Talent mobility and advancement - Self-reported sense of belonging
Organization	- Budget allocation to support DEI program efforts - Learning and development for DEI - Percentage of diverse 4-H staff who apply for jobs - Inclusive policies

Strategic Direction	Examples of Success Indicators
Conduct ongoing critical organizational assessments	1. Youth, staff and volunteer demographics at parity for communities/states. 2. Successful creation and utilization of a database and accessible dashboard providing demographics on youth, staff and volunteers for states to track parity. The dashboard will have drill down functionality for multiple demographic groupings, location, program, delivery mode and positive youth development indicators. 3. State report card describing use of DEI indicators to review policies, programs and processes. Metrics to include: % of policies and processes reviewed; % of policies and processes revised or redesigned, % of programs that are culturally relevant. 4. Implementation at the state level of accountability system to include use of the University of Minnesota Extension's 4-H Program Quality Assessment Tool and other DEI indicators identified by the Access, Equity and Belonging Committee. 5. National database of youth developmental outcomes by zip code and program delivery mode (e.g. Common Measures)
Recruit, retain and develop youth development professionals	1. Creation of recruitment/hiring/retention cycle database and accessible dashboard providing demographics of staff and volunteers, including data of participation in equity and inclusion professional development. 2. Establish national standards of knowledge and skills needed to provide equitable and inclusive positive youth development, such as the Professional Knowledge and Research Competencies. Professional development programs must meet these standards to be approved. 3. Establish a clearing house for models for staff pathways into different professional youth development roles.
Clarify and define governance and leadership accountability	1. Establishment of a national leadership office, it's roles, scope of work and funding sources. 2. Establish national standards for the use of the 4-H logo and emblem. Metrics to include the percent of counties within each state in alignment with the standards. 3. Establish a clearing house for governance models. Metrics to include the number of states on a development path to implement one of the models; the number of states having implemented one of the proposed models; and the number of state leaders receiving mentoring on governance model implementation.

Develop and strengthen new and existing partnerships	1. Number of new partnerships 2. Database of new and existing partnerships to include the nature of partnership: PYD programming, volunteers, and/or funding that can be viewed at the national and state level 3. Results of environment scan showing change in perceptions of 4-H related to equity and inclusion at both the state and national level.
Diversify funding streams	1. New funds measured in dollars, number of new federal and state funding sources, and number of new private/non-profit funders. 2. Establish a clearing house for funding models and funding allocation best practices 3. Change in existing funding allocations across programs and delivery modes, measured in dollars and percent of total funding at the state and national levels.
Incorporate diversity, equity and inclusion principles into programs	1. Develop national standards for inclusion and equity professional development. 2. Adoption and delivery of DEI programming such as True Leaders in Equity, Juntos and Teens as Teachers. Metrics to include the number and percentage of youth and volunteers participating in DEI programs. 3. Use of common DEI indicators, such as those identified by the Access, Equity and Belonging Committee, to evaluate programs. Success measured by the number and percentage of programs that have been evaluated and the number and percent of programs that have been revised or redesigned based on the results of those evaluations.
Develop data governance and measurement principles and structures	1. Implementation of a sustained data governance work group for 4-H system. 2. Development of a set of principles related to DEI data collection and reporting for the national and state levels. 3. Working and accessible dashboards to support the metrics and indicators described above and those developed by the working group dedicated to each strategic direction. The dashboards must include reporting functionality that can disaggregate by national, state, and county level where indicated as well as by demographic groups and program.

FOCUSED IMPLEMENTATION

NOTE: Implementation planning is the final step of the process. It will be completed after the report and recommendations are approved by the ECOP 4-H Leadership Committee.

During this final strategic planning session, implementations teams for each of the strategic directions will develop first-year implementation plans and specific quarterly action plans by addressing the question, "W*hat will be our specific measurable accomplishments in the first year?"*

These teams will take responsibility for the national strategic directions, defining what success looks like, what they are committed to doing in the first year, and detailing actions, timeframes, responsibilities, resources and leadership needed to support the strategic direction.

In addition, they will identify state initiatives or national committees working on similar projects that need to be included or leveraged. National committee examples include:

- The 4-H Program Leaders Working Group's Access, Equity and Belonging Committee which aims to increase the capacity of 4-H and the Cooperative Extension System to meet 4-H opportunity goal and to create a more inclusive organizational culture.
- The 4-H Pathways Project which is rethinking how 4-H is delivered—with a customer centric approach.
- The True Leaders in Equity Institute which equips youth-adult teams to be change agents within the Cooperative Extension System.

RECOMMENDATIONS and NEXT STEPS

The 4-H Equity Design Team is proposing the following timeline and recommendations:

JANUARY- MARCH 2021
- Submit the report for review, discussion and endorsement with:
    - ✓ ECOP 4-H Leadership Committee
    - ✓ 4-H Program Leaders

MARCH - MAY 2021
- Identify staffing support needed for the work teams
- Name members and launch 4-H Equity Coordinating Committee and Implementation Teams

JUNE - DECEMBER 2021
- Host implementation planning for coordinating committee and implementation teams
- Develop first-year implementation and action plans
- Establish initial metrics and indicators
- Host quarterly plans of work meetings to coordinate all efforts
- Communicate with broader organization

4-H Opportunity Statement

February 2020

ECOP 4-H Equity Design Team

1. **The Goal:** To Accelerate the Opportunity Statement listed below

   4-H, the nation's largest youth development organization, will embrace the rich diversity of youth, families and communities that comprise our nation. We will grow our organization in ways which leverage that diversity to improve the economic, environmental and social conditions in which people live.

   At a time when disparities to resources and opportunities are growing for families across the country, the need for 4-H high quality positive youth development has never been greater. Cooperative Extension and 4-H have an opportunity to close the gap in wellbeing and economic mobility as we undertake our bold goal to engage 10 million youth reflecting the diversity of the communities, we serve by 2025.

   To achieve the growth and impact to which our system is committed, Extension must build and sustain community partnerships to offer 4-H in response to community needs, and re-examine how we hire and support staff, recruit and support volunteers, and fund and sustain programs. Uniting toward an inclusive, diverse and equitable 4-H is the fuel we need to increase access for all youth, families and communities—in every town, every city and every corner of America."

B. How: The Work

1. The design team will identify the vision statement

One has already been developed and reviewed by ECOP 4-H. This Design Team needs to affirm and/or adjust it as per Andy Turner's communication to me.

The ECOP 4-H Equity vision statement is as follows:

Cooperative Extension and 4-H have an opportunity to close America's widening gap in wellbeing and economic prosperity. As America's largest youth development organization, 4-H embraces the rich diversity of the youth, families and communities that comprise our nation. That is why we have set bold goals for 2025—to reach 10 million youth to fully reflect the demographics and social conditions of the nation.

To achieve this level of growth and impact, 4-H must be committed to continual evaluation of program delivery, developing professional educators, engaging volunteers, and building new partnerships.

We believe that when we build a more inclusive, diverse and equitable organization, 4-H members will excel in social mobility and communities will thrive.

2. The design team will work to create a vision of the future.

- Consider how the world is changing and how Extension needs to adjust so 4-H Youth Development can keep winning in the marketplace and achieve the opportunity statement.
- Consider what got us to our current success won't keep us there and how we can make episodic changes and not an on-going series of strategic adjustments.
- Consider environmental scans that need to be done and engagement of stakeholders.
- Consider a paradigm shift of how the thriving model influences a new vision of   4-H youth development.
- Consider episodic changes in staffing patterns.

Inclusive Excellence Self-Assessment

April 2020

Dear ECOP 4-H Equity Design Team Members,

As we prepare for the 3-day Inclusive Excellence Retreat in July 2020, we want to help you be fully prepared to bring key insights from your state that will inform the national plan, and to begin building the local coalition for inclusive excellence in your state's 4-H program.

In order to understand the ways your state 4-H program both leverages and impedes inclusion, diversity and equity, we have posed a series of questions relating to each dimension of the Inclusive Excellence Framework. These questions will help you deepen your understanding of how 4-H in your state navigates inclusion, diversity and equity. We suggest first answering the questions from your own perspective. Then select 5 to 10 other people in your state and spend 30 to 45 minutes with each of them on the phone or over Zoom to ask them these questions.

When choosing the 5-10 people to talk to, consider the following:
- Who are the innovators in your state around inclusion, diversity and equity?
- Who is more resistant to change related to inclusion, diversity and equity?
- Who has left your program and would it be beneficial to talk with them?
- Have you included people who occupy a variety of roles: volunteers, staff members, county commissioners, youth leaders, university partners?

Please complete your interviews by July 1, 2020. We will discuss your findings during our July 14 webinar.

We appreciate you taking time for these important conversations. They will not only deepen your understanding, but they will help you begin developing the relationships that will be needed as your state ventures out on its Inclusive Excellence journey. Give yourself permission to connect and be curious.

Best Regards,
      Dorothy McCargo Freeman
      Kevin McDonald
      Aimee Viniard-Weideman
      Tara Warne-Griggs

Inclusive Excellence

Inclusive Excellence is an organizational change model that merges quality with inclusion, diversity and equity. Four principles drive the framework's success:

1) Inclusion, diversity and equity become a business and ethical imperative, rather than a moral imperative.
2) It provides a common language related to inclusion, diversity and equity.
3) It makes doing inclusion, equity and diversity work everyone's job throughout the organization.
4) The framework is strategic, intentional and metric driven.

The model is comprised of 5 dimensions:

1) Access & Success
2) Climate
3) Training & Education
4) Infrastructure
5) Community Engagement

The dimensions allow complex organizations, such as 4-H, to assess their current efforts and develop cohesive, mutually reinforcing initiatives. Strong initial assessments enable 4-H programs to determine the root causes of disparities in participation and/or outcomes for the youth they serve. The tool that follows begins that assessment work from a perspective of curiosity and connection.

Questionnaire

Access and Success

1. What has made it possible for you to successfully engage diverse youth?
   a. What hinders you from engaging diverse youth in your state?
2. What has made it possible for you to successfully recruit volunteers from diverse backgrounds/communities?
   a. What hinders you from being successful in being able to recruit new volunteers from diverse backgrounds/communities?
3. What factors make it possible or difficult for you to retain youth and/or volunteers from diverse backgrounds/communities?

Climate and Intergroup Relations

1. Does your staff reflect the parity of your state?
    a. If not, what factors make it difficult to reach parity?
    b. If so, what factors helped you accomplish this?
2. What has helped your staff and volunteers be inclusive in their programming?
    a. What keeps your staff and volunteers from being inclusive in their programming?
    b. What specific examples do you have?
3. Have you adjusted the language you use around inclusive, diversity and equity across the state? How?
4. How has the culture of your state 4-H program enabled or hindered the successful engagement of inclusion, diversity and equity related issues?

Education and Training

1. Beyond the training that has already been done in your state, what do you see to be the most needed knowledge and skills related to inclusion, diversity and equity?

Organizational Infrastructure

1. Beyond training, what keeps your state from moving this work forward?
2. What policies or practices have enabled or hindered inclusion, diversity and equity in your program?
3. Does your current infrastructure allow you to move this work forward now?
    a. If so, why?
    b. If not, have there been previous attempts to change the infrastructure? What have they been?

Community Engagement

1. How have you engaged diverse communities in 4-H youth development programming?
2. What kinds of engagement have been tried in communities in order to sustain your programs?
3. What worked?
4. What got in the way of success?

Citation

Carden, F. (2017). Building Evaluation Capacity to Address Problems of Equity. New Directions for Evaluation, 2017(154), 115-125.

Ehrhart, M.G., Schneider, B. and Macey, W.H. (2014). *Organizational climate and culture: An introduction to theory, research, and practice*. New York: Routledge.

Harrin, E. (2010). 4 types of stakeholders in project management. August 6, 2010. https://pmtips.net/article/4-types-of-stakeholders-in-project-management.

Judge, W.Q., Jr. (2012). *Focusing on organizational change*. Flat World. https://saylordotorg.github.io/text_focusing-on-organizational-change/s00-license.html.

Smith, L. W. (2000). Stakeholder analysis: a pivotal practice of successful projects. Paper presented at Project Management Institute Annual Seminars & Symposium, Houston, TX. Newtown Square, PA: Project Management Institute

National 4-H Equity Design Team
Strategic Planning VISION

What do we want to see in place in 6 years as a result of our actions?

Increased access, equity & opportunity through a variety of 4-H experiences	Diverse and culturally competent 4-H professionals and volunteers	A shared mental model of 4-H across the country	New national partnerships that help us reach the goal	Equitable policies and procedures	Strategic, sustainable resource alignment	Culturally responsive 4-H marketing	4-H programs addressing issues of social justice
Youth enter around interests or own curiosity through a variety of delivery models	A pipeline to recruit and support diverse 4-H professionals & administrative leaders	Consistent definition of positive youth development	4-H has a connection to the federal gov't (NIH, Ed Dept) not exclusive to USDA	Policies and procedures in 4-H that are exclusive	Resource allocation reflects "the goal"	4-H is widely recognized in suburban and urban areas	4-H addresses issues of social justice
Programs in 4-H that are inclusive	Youth volunteers and professionals reflect the diversity of our country	Shared agreement & understanding of 4-H vision and goals with ECOP, NIFA and County Councils	Well-developed MOUs with prominent national multicultural organizations	Re-think or streamline processes in 4-H to make more welcoming to diverse audiences	Funding streams have evolved to sustain & grow contemporary, culturally relevant 4-H programs	High levels of awareness of 4-H among general public	4-H youth are able to identify and address inequities in their schools & communities
Full development of a virtual platform - a way to access 4-H virtually	Agents are trained to feel confident in working with diverse youth	All Extension programming is branded as 4-H	4-H and Extension lead university engagement with support of the president	Data management system that reveals info about the youth experience on the continuum of engagement	Established endowed educator positions for marginalized audiences		

4-H youth address inequities in their schools & communities	Established endowed educator positions for marginalized audiences	Use broader definition of 4-H to garner support					
Different models of engagement, including online							
Developing a more responsive set of resources to respond to diversity							
Removed barriers for youth to fully experience the breadth of opportunities within 4-H							
4-H is primary provider of after school programming in urban areas							

National 4-H Equity Design Team
Strategic Planning BARRIERS

What is blocking us from achieving our vision?

Unclear and inconsistent local, state and national leadership and authority	We are stuck in yesterday	4-H reflects dominant white privilege culture	Difficulty hiring and retaining quality and culturally competent staff	Limited and inequitable resource capacity and distribution	Potential conflicts across new and old partnerships
Minimal 4-H national staff to create partnerships	Narrow brand image	Some may feel there is no place for social justice discussion in 4-H	Hard to compete for quality and diverse employees	Limited financial and human capacity to meet goals	Uncoordinated and disorganized buy-in from all sectors
Uncertainty on how to navigate between federal partners and landgrant universities	Alumni have outdated understanding of 4-H program	Political polarization in the US	Restricted, outdated, narrow and biased staffing	Resource poor higher education environment	Competing and conflicting interests of new partners
Disjointed alignment of extension and landgrant	Biased and narrow founders syndrome	Reluctance to take a stand	Excessive staff turnover	Inequity in distributing funding in 4-H	Could lose, or need to say goodbye to, partners who don't agree
Inconsistent assessment of 4-H as part of university	Current stakeholders may want to maintain status quo	Apprehension or unwillingness to change	Faculty and staff will be overwhelmed	Stagnant program resources	
Fragmented view of what is local, state and national 4-H	Customs and cultures of traditional 4-H volunteers	Not everyone feels the same about social justice			
Fragmented common definition for 4-H across the country	Outdated and inflexible policies and procedures	Extensive ethnocentric mindsets			

National 4-H Equity Design Team **Strategic Planning STRATEGIC DIRECTIONS**					
What innovative, substantial actions will deal with the barriers and move us toward our vision?					
Conduct ongoing critical organizational assessments	**Recruit, retain and develop youth development professionals**	**Clarify and define governance and leadership accountability**	**Develop and strengthen new and existing partnerships**	**Diversify funding streams**	**Incorporate diversity, equity and inclusion principles into programs**
Utilize critical assessments through AEBC equity rubric	Change hiring practices to recruit YD professionals	Redefine the roles and responsibilities of existing partners	Align with organizations that align with common goals	Recruit and train state foundation board and director about state and national goals	Create more national awards recognizing diversity, equity and inclusion
Develop and conduct an equity assessment of 4-H (local, state, national)	Implement mandatory intercultural competence professional development in every state	Develop model MOUs related to expectations of use of 4-H name and emblem	Establish new organizational relationships	Develop a funding formula for 3-H through all 3 levels (federal, state, county)	Leverage youth voice from inside and outside 4-H to advocate change
Review federal policies to ensure that culturally relevant 4-H units are recognized (includes NIFA policies, civil rights audit)	Create local and national pipelines to recruit and retain diverse 4-H faculty and staff	Create one 4-H liaison office or team for national leadership	Launch new program development partnerships with ethnic fraternities and sororities (1890s/1994s/HSI)	Create new hybrid delivery methods/virtual learning to generate new revenue	Create culturally relevant principles for what success looks like in 4-H programs
Reinvent culture of 4-H to include diverse audiences	Develop and communicate strategies to how to	Develop and communicate strategies to how to	Develop and communicate strategies to how to	Seek strategic non-traditional sources of funding	Focus on trauma-informed practices

	make tough decisions to educate/disengage with partners who conflict with our values (including longstanding partners)	make tough decisions to educate/disengage with partners who conflict with our values (including longstanding partners)	make tough decisions to educate/disengage with partners who conflict with our values (including longstanding partners)		
	Develop a staff retention strategy	Refine new volunteer management model (California has an example)	Cultivate relationship with League of Cities		
	Develop a national network or affinity group to provide support to diverse 4-H professionals				
	Create national training to retool staff and volunteers on the public nature of 4-H				
	Refine new volunteer management model (California has an example)				
	Include intercultural competence on job descriptions (staff and volunteers)				

National 4-H Equity Design Team Summary of Strategic Planning VISION, BARRIERS and STRATEGIC DIRECTIONS		
VISION	**BARRIERS**	**STRATEGIC DIRECTIONS**
What do we want to see in place in 3-5 years as a result of our actions?"	*What is blocking us from achieving our vision?*	*What innovative, substantial actions will deal with the underlying barriers and move us toward our vision?*
▪ Increased access, equity and opportunity through a variety of 4-H experiences ▪ Diverse and culturally competent 4-H professionals and volunteers ▪ Equitable policies and procedures ▪ New national partnerships that help us reach the goal ▪ Strategic, sustainable resource alignment ▪ Culturally responsive 4-H marketing ▪ Shared mental model of 4-H across the country ▪ 4-H programs addressing issues of social justice	▪ Unclear and inconsistent local, state and national leadership and authority ▪ We are stuck in yesterday ▪ 4-H reflects dominant white privilege culture ▪ Difficulty hiring and retaining quality and culturally competent staff ▪ Limited and inequitable resource capacity and distribution (federal, state and county levels) ▪ Potential conflicts across new and old partnerships	▪ Conducting ongoing critical organizational assessments ▪ Recruiting, retaining and developing youth development professionals ▪ Clarifying and defining governance and leadership accountability ▪ Developing and strengthening new and existing partnerships ▪ Diversifying funding streams ▪ Incorporating diversity, equity and inclusion principles into programs

National 4-H Equity Design Team
STRATEGY 1
Conduct ongoing critical organizational assessments

Current Reality	First Year Actions	Success Indicators
What is the current reality? What's in place? What's missing? What are the opportunities?	*What do you need to accomplish in the next 12 months to move from current reality to where you want to be in 6 years?*	*What will be different in 6 years if you really mobilize behind this strategic direction?*
What's in place? ▪ NIFA Civil Rights Audit can be built upon ▪ AEBC equity rubric is under development ▪ Data management task force is reviewing considerations of ES237 (Federal report that every state/LGU is required to submit) ▪ BIT (Behavioral Insights Team) **What's missing?** ▪ No uniformity in how programs are recorded ▪ Some of the 1890's are not tied into 4-H online ▪ Not able to differentiate between 1890 and 1862 contributions ▪ Do not capture data on all marginalized audiences for youth, volunteers and faculty/staff ▪ Inconsistent capturing of PYD outcome data	▪ Agreement on what a national data collection would look like ▪ Assess where states are related to DEI goals ▪ Pilot an equity rubric to use at local and state level ▪ Pilot the HBCU and HIS Volunteer Recruitment project ▪ Improve authentic communication for 1862s and 1890s ▪ Improve communication with After-school and in school providers and offer to include 4-H curriculum/experience ▪ Establish new national level partnerships (i.e. agreements with agencies at national level) ▪ LGUs develop their ongoing DEI strategy and commitment ▪ As 4-H expands to reach new partners, ensure it is presented as ONE 4-H youth development program with same language ▪ Consistently brand 4-H youth development	▪ Clear picture of who is participating in programs, to inform decision-making ▪ National database on youth participation, volunteer engagement, faculty/staff demographics and PYD outcomes ▪ All institutions actually reporting (100 % compliance in reporting) ▪ Equitable program offerings ▪ Funds are distributed equitably according to greatest need, opportunity, growth potential ▪ 4-H organizational climate surveys are being done annually across the country (accountability, report card) ▪ People in counties will understand why they should be including everyone and they will take action to be inclusive ▪ People in counties will understand why they need inclusive learning spaces in 4-H and have accountability system in place to make it happen ▪ Program Quality Assurance will be in place and continually assessed ▪ 4-H policies and practices that advocate equity will be in place

Opportunities ▪ 4-H Online and ZSuite enroll and collect data on community clubs; we need a better system for enrolling youth who are not a part of community clubs ▪ Recruitment of staff from HBCUs, HSIs (Hispanic Serving Institutions) and 1994s ▪ Need to go into schools to reach new youth and make connections with after-school network world ▪ Should be collecting demographic data on our staff to see how we are doing/monitoring ▪ Reinventing culture of 4-H to include diverse audiences ▪ Assessments of program quality assurance related to PYD		

National 4-H Equity Design Team
STRATEGY 2
Recruit, retain and develop youth development professionals

Current Reality	First Year Actions	Success Indicators
What is the current reality? What's in place? What's missing? What are the opportunities?	*What do you need to accomplish in the next 12 months to move from current reality to where you want to be in 6 years?*	*What will be different in 6 years if you really mobilize behind this strategic direction?*
What's in place? ▪ Template is available for recruitment but limited flexibility ▪ Examples from some states **What's missing?** ▪ Don't have a common set of principles for 4-H for PYD ▪ Don't have current promising practices ▪ Don't have consistently used competencies across the system ▪ No competitive salaries ▪ Lack of onboarding process to 4-H ▪ Missing pipeline for recruiting diverse professionals (ie internships) ▪ No staff retention plan **Opportunities?** ▪ PKRC to guide PYD competencies and includes section on access, equity, and opportunity ▪ Need greater commitment in our professional association (NAE4-HYDP) to DEI; they focus on prof dev. ▪ National adoption of 4-H Thrive Model	▪ Develop targeted recruitment for specific populations ▪ Create national vacancy announcement templates ▪ Make decisions about the roles of staff (implementing vs. facilitating) ▪ Create marketing plan for PKRC ▪ Collect conflict management / civil discourse processes ▪ Identify promising practices for recruitment, retention, and promotion ▪ Create national database of LGUs that have an extension degree or program ▪ Establish affinity groups. ▪ Create templates for internships /pipeline programs or projects ▪ Develop a specific professional development track for specific competencies (ie FSLI) ▪ Offer professional development on 4-H leading frameworks and models ▪ Create common language used in position vacancy announcements that would be attractive to increasing the diversity of the applicant pool	▪ Revised equity recruitment plan ▪ National staff development training plan ▪ Professionals demonstrate increased knowledge, skills, and attitudes in the DEI competencies in the PKRC ▪ LGU's recruit, retain and successfully promote diverse staff and faculty ▪ Competencies are built into professional YD development plan ▪ Tools and support for conflict management / civil discourse ▪ Diverse workforce ▪ Inclusive quality programming PYD ▪ Increased diversity among PYD administration ▪ 4-H programs guided by PYD research and theory ▪ "Staff" reflect our volunteers and youth ▪ Evidence of staff pathways that reflect the diversity vision ▪ Pool of applicants and the people working in 4-H are diverse ▪ There is retention and people are meeting their goals

▪ CYFAR and Urban Extension Conference ▪ Acculturation process in 4-H	▪ Engage in shared regional or national resourcing to retain an HR firm to increase diverse recruitment (like crowdsourcing) ▪ Create process for applications to be considered across LG Universities instead of applicant applying to one university at a time ▪ Develop accreditation or certificate program as a Thrive Model ▪ Develop national diversity and inclusion training that has an accreditation component	▪ Equivalent positions across 4-H ▪ A cooperative culture among state leadership staff ▪ Planned career path for those already in the system

National 4-H Equity Design Team
STRATEGY 3
Clarify and define governance and leadership accountability

Current Reality	First Year Actions	Success Indicators
What is the current reality? What's in place? What's missing? What are the opportunities?	*What do you need to accomplish in the next 12 months to move from current reality to where you want to be in 6 years?*	*What will be different in 6 years if you really mobilize behind this strategic direction?*

What's in place?
- 1890s are represented on national 4-H leadership bodies
- ECOP, PLWG, National 4-H Council, NIFA, ECOP 4-H

What's missing?
- Common definition of 4-H. There are multiple 4-H programs in the US and everybody has own definition of 4-H
- Less leadership and guidance coming from NIFA and/or their guidance does not align with 4-H's organizational movement to DEI
- NIFA is susceptible to political pressure and inconsistent guidance
- No national 4-H standards for programs
- County governments (elected officials) have an antiquated view of what 4-H is and does
- No national on boarding program for state 4-H leaders
- Common understanding of what 4-H is (Youth Development)

First Year Actions:
- Establish who has to be at the table to advance strategy (ECOP 4-H)
- Communicate the national vision to the front line, in a way that is not dictatorial
- Establish generative approach to having discussion around governance and leadership
- Draft on-boarding process for 4-H state leaders
- Create an organizational chart that shows the levels of influence in 4-H
- Begin process of developing/adapting inclusive metrics to gauge 4-H success
- Ensure that staff are prepared to manage potential naysayers and change
- Collect and identify successful state-level MOUs to provide states options of rewriting MOUs with counties
- Gain agreement on accountability metrics/mechanism for strategic equity plan
- Understand relationship between all land grant university systems (1994, 1890, 1862, HSI)

Success Indicators:
- Have a National vision for 4-H
- Existing 4-H National Standards
- On-boarding national process for state leaders in place
- Empowered leadership (Example - PLWG)
- Extension Directors and other decision makers will be aligned with national vision of 4-H
- Increase investment of extension system into 4-H
- Establishment of 4-H leadership office funded by land grant university system
- Metrics developed to measure leadership accountability
- Metrics developed to gauge 4-H success
- Framework that provides leadership and accountability at the national level but still allows flexibility to meet unique needs at the local level
- Common language around question of why we (4-H) want to be more inclusive
- Extended leadership team consisting of several partners

▪ Lack of communication between levels of governance **Opportunities?** ▪ Each level of 4-H brings opportunities and challenges ▪ Develop an MOU between land grant university system, national 4-H council, and USDA/NIFA		▪ Equitable and valued relationship among land grant institutions ▪ Increased buy-in from land grant university presidents

National 4-H Equity Design Team
STRATEGY 4
Develop and strengthen new and existing partnerships

Current Reality	First Year Actions	Success Indicators
What is the current reality? What's in place? What's missing? What are the opportunities?	*What do you need to accomplish in the next 12 months to move from current reality to where you want to be in 6 years?*	*What will be different in 6 years if you really mobilize behind this strategic direction?*
What's in place? ▪ We have LG system (1890/1862/HSI/1994) ▪ National 4-H Council has increased national partnerships with other organizations and marketing groups ▪ Council just finalized a situational guidebook on having difficult conversation with partners on vision ▪ 4-H National Council Grows Campaign ▪ Still remnants of our relationship with Dept of Defense ▪ International Programing relationships in place **What's missing?** ▪ Missing the engagement of diverse organizations ▪ Missing partnerships with colleges ▪ Missing relationships with orgs that support diverse populations (i.e. special olympics) ▪ Missing Partnerships with traditional ethnic fraternities and sororities ▪ Missing relationships with religious organizations	▪ Develop guidance on language with prominent partners (i.e. guidebook on difficult conversation with partners who do not share DEI commitment) ▪ Establish MOU with partners, including non-discrimination statement and DEI principles ▪ Assess the political constraints (develop assessment tool to evaluate partners, risks, and liabilities vs. gains) ▪ Set parameters around what 4-H thinks is a strong DEI partner (guiding parameters) to create consistency ▪ Increase engagement with elected officials with whom we may not have traditionally reached out to in order to diversify and broaden base of support ▪ Make recommendations to budget and legislative committee of ECOP to engage with non-4-H alums in Congress ▪ Develop and implement relevant communication and marketing to our stakeholders and diverse groups ▪ Build relationships within the university (outreach people in colleges)	▪ Increased partnerships with organizations clearly invested in equity and social justice ▪ Increased engagement of diverse collegiate organizations (i.e. fraternities, sororities, African American, Latinx) ▪ Educated partners or severed relationships with partners who do not share the DEI commitment; with guidance for local and state leaders in doing this ▪ Partnerships that lead to increased revenue streams ▪ Ability to make decisions for long term success of programs (not just status quo to keep people happy) ▪ Increased numbers of diverse youth ▪ We make clear what 4-H has to offer; clear with potential partners about what 4-H value brings to table ▪ Clear messaging about the value of 4-H with intentional communication and programming design behind it (actions will show a different 4-H) ▪ 4-H is the youth development program of the LGU and they understand that we are outreach arm at the university to youth

Opportunities? - A lot of partnering with other youth orgs that could be leveraged - We need to question our historical relationships or funders… do they serve our current needs? - Partnerships with military bases - Partnerships with ag companies that could expand beyond animal ag to broader partnerships in agriculture	- Market 4-H in the university (4-H week, communications to Deans/Directors add research language that 4-H can be a lab of learning, etc.) - Build relationship with the National League of Cities - Reach out to the new executive branch administration (are their allies there being named to key roles?) - Develop and conduct a Climate survey of youth and families	4-H is perceived externally as anti-racist, LGBTQ friendly, etc. (consumers and potential partners see us this way) - Established partnerships with Dept. of Education, Public Health, etc.

National 4-H Equity Design Team
STRATEGY 5
Diversify funding streams

Current Reality	First Year Actions	Success Indicators
What is the current reality? What's in place? What's missing? What are the opportunities?	*What do you need to accomplish in the next 12 months to move from current reality to where you want to be in 6 years?*	*What will be different in 6 years if you really mobilize behind this strategic direction?*
What's in place? ▪ Administrators do have authority to allocate existing capacity funding to 4-H **What's missing?** ▪ Not all state 4-H are tied into their state foundations ▪ Not all states have strong foundations ▪ Funding is tied to a specific program or a specific delivery mode that does not increase diversity and inclusion ▪ No accountability for raised funds through clubs (in some states) ▪ No coordinated application process for large grants like NSF (competing vs. collaborating) ▪ Inconsistent communication from national council when approaching funders in your state ▪ There are different MOUs or no agreements when using the 4-H name/Symbol ▪ National 4-H council grant opportunities that are designed to meet deliverables are difficult to meet if small state or 1890s	▪ Research how many organizations are contributing to 4-H ▪ Educate our staff on the appropriate use of money raised with the 4-H name and emblem ▪ Better define the value in allocating funds to 4-H (funders and community) ▪ Examine different funding models to better educate ourselves to make better choices ▪ Identify diversified programs matched with diversified partners (OJJDP) ▪ Develop plan to implement National 4-H office in DC that is funded by LGUs to coordinate (Western Center Metropolitan Extension and Research as example of a model) (https://metroextension.wsu.edu/) ▪ Create financial report to understand the current funding stream for 4-H ▪ Cultivate relationships with diverse youth who have been positively impacted by 4-H program as part of long-term financial strategy ▪ Support ongoing efforts to expand the use of 4-H name and emblem	▪ Sustainable funding streams from diverse sources ▪ New partnerships and initiatives ▪ Unrestricted funds ▪ Enhanced development ▪ Diversified programs matched with diversified partners (OJJDP) ▪ Equity in funding across the system ▪ Double the amount of private sector funding from current levels ▪ Online database of current national grants including titles and brief descriptions of proposal and acknowledgement if inviting collaborators ▪ Funding from federal agencies that are not USDA is equal to or greater than funding from USDA ▪ Compile all state's funding reports to understand the current funding stream for 4-H ▪ More compelling funding narratives (expressing the value) ▪ A culture and skill set to develop funds for the program

Opportunities?

- Many states have both county and state foundations but there is no uniformity in how deployed around the country
- Look at other departments for funding that may be a match for youth development
- Build 4-H connection with colleges and communicate how they can support 4-H (ie STEM careers exposure and recruiting to college connections)
- Federal working group advocating for dollars to 4-H (ie the legislative advocacy)
- Increasing funding from corporate sector through national 4-H Council that could continue to grow if able to deliver

- Support resources for state foundations to increase board diversity and commitment to supporting our DEI vision
- Share best practices forming funding formulas to support positions to meet relevant needs in communities (states that have sustained permanent positions to increase capacity)
- Assess current engagement with federal funders
- Work with extension directors to equitably fund 4-H from federal formula funds
- Explore how/if the college home of extension/4-H impacts funding allocations
- Align foundation funding strategies to the most urgent needs

- Increase visibility with all LGU leadership (ie potential students are 4-H alumni)
- Leverage multistate positions to address greater needs
- Funding allocation matches geographic and programmatic needs
- Increased sources of funding to reduce barriers to participating
- Align foundation funding strategies to the most urgent needs
- Sharing resources for administrators to adapt or update funding formulas through county, state, and national level

National 4-H Equity Design Team
STRATEGY 6

Incorporate diversity, equity and inclusion principles into programs

Current Reality	First Year Actions	Success Indicators
What is the current reality? What's in place? What's missing? What are the opportunities?	*What do you need to accomplish in the next 12 months to move from current reality to where you want to be in 6 years?*	*What will be different in 6 years if you really mobilize behind this strategic direction?*

What's in place?
- Various national groups sharing information on promising programs that include DEI principles (though this is not coordinated)
- Several states have DEI plans in place
- 4-H program exists within a structure (LGU) that has vast resources in this area (faculty, students and staff)
- Several innovative and culturally relevant programs that target DEI principles
- Pockets of trauma informed care experts in 4-H that provide programing
- Some national DEI awards for 4-H professionals and youth
- AEBC and eXtension DEI page has a repository of promising practices and resources
- CYFAR has a database that captures reports of funded programs
- Pathways project

What's missing?
- Current programs are not sustainable in large part due to short term funding

- Collect DEI plans in a centrally located place where everyone can access
- Plan on how to get diverse youth voice in program development and implementation
- Communicate what resources are currently available
- Establish set of DEI evaluation metrics for funding programs through Council and NIFA grants
- Create performance standards and accountability metrics that are managed by extension directors
- Utilize the thriving model through an equity lens, and we have fact sheets and literature review
- Establish a youth advisory group for AEBC
- Require professional development to enhance culturally relevant teaching practices (tied to expectations)
- Create a checklist to review 4-H practices and artifacts

- Coordinated PYD-DEI professional development on promising practices
- Central leadership body who establishes and tracks metrics
- All 4-H programs will be youth and culturally relevant - judged by program assessment or guidelines
- National DEI credentialing (CEU system) for staff and volunteers
- AEBC work infused into fabric of national leadership and work
- Establish national recognition and sustained funding to scale up DEI promising programs and efforts
- Increase 4-H curriculum focused on DEI and social justice
- DEI relevant curriculum developed from onset
- Develop micro-certification around DEI programing
- Elevate DEI-social justice programmatic area in addition to infusing into fabric of 4-H PYD
- Diversity and inclusion is a permanent element of 4-H culture

- No mechanism to capture lessons learned from funded programs - Inconsistent DEI training for volunteers 4-H culture is not welcoming to new participants 4-H practices and artifacts do not reflect Diversity, Equity, and Inclusion 4-H games, songs, trivia questions, etc. are not welcoming of diverse communities - Even white rural kids are choosing not to join 4-H because of behaviors or practices of volunteers regarding DEI values, or lack of relevant programs **Opportunities?** - Success stories at the level of individual youth being impacted positively by 4-H (how to build on those successes) - Include diverse youth voices in program development, review, and implementation	- Review and revise policy and practices to reflect DEI values (ex. What is a 4-H member?) - Identify and address barriers of access to 4-H programs	- Inclusion is valued by staff - Become comfortable questioning the status quo - Support trainings that encourage civil discourse - Practices in place to coach up or coach out volunteers who don't support DEI efforts

National 4-H Equity Design Team
STRATEGY 7
Develop data governance and measurement principles and infrastructure

This strategy was added after the 4-H Equity Design Team created the first six strategic directions because,

- All of the strategic directions are dependent on a data governance and management system
- Data driven decision-making is key to successfully implementing Inclusive Excellence
- 4-H data and reporting structures and processes are underdeveloped
- Design team named the need to understand current reality objectively and have the ability to tell the story with data
- Success in other strategic areas hinge on data, analysis and insight

Data governance is best defined as the strategic, ongoing and collaborative processes involved in managing data's access, availability, usability, quality and security in line with established internal policies and relevant data regulations.

Data governance establishes processes for creating & managing:
- Data definitions
- Data collection
- Storage, structure, access
- End-user needs (program leader, county staff, program leader, Extension director, ECOP, compliance reporting)

Data systems need to track and report on:
- Process objectives – What you will do
- Outcome objectives – The difference that will make
- Quantitative measures – descriptive (counts, percentages, rates), correlations, associations
- Qualitative measures – interviews, focus groups, narratives, life histories, observations, document review, videos, pictures, mapping
- Outputs
- Outcomes
- Impacts related to economic and social mobility

National 4-H Equity Design Team
Strategic Plan Metrics and Measurement Examples

Strategic Direction	IE Dimension	Metric	Population	Disaggregation	Measurement Notes	Example (hypothetical)
Conduct Ongoing Critical Organizational Assessments	Infrastructure	Implementation of equity reporting system	Organizational	Role and Level	This is an indicator rather than a quantitative metric. Ideally 4-H will have reporting on youth, adult and organizational metrics and be able to disaggregate them down to the program, state, regional, and national levels.	Development and implementation of common data definitions and metrics, and a reporting calendar for all state 4-H programs
Recruit, Retain and Develop Youth Development Professionals	Access & Success	Volunteer demographics	Adult	Demographics	Counts and percentages placed in the context of the population and or need for engagement	25% of volunteers in Jasper County are African American representing xx% of the community
Recruit, Retain and Develop Youth Development Professionals	Access & Success	Staff demographics	Adult	Demographics	Counts and percentages placed in the context of the population and or need for engagement	38% of staff in Florida are LatinX ; % of staff who engage marginalized and diverse populations
Recruit, Retain and Develop Youth Development Professionals	Access & Success	Leadership demographics	Adult	Demographics	Counts and percentages placed in the context of the population and or need for engagement	6% of program leadership in 4-H is African American
Recruit, Retain and Develop Youth Development Professionals	Access & Success	volunteer retention	Adult	Demographics	Counts and percentages	3% of African American volunteers were retained in Ohio and were retained beyond their first year between 2015 and 2020

Recruit, Retain and Develop Youth Development Professionals	Access & Success	staff retention	Adult	Demographics	Counts and percentages	85% of staff were retained beyond their first year between 2015 and 2020
Recruit, Retain and Develop Youth Development Professionals	Access & Success	Leadership retention	Adult	Demographics	Counts and percentages	60% African American program leaders were retained between 2015 and 2020
Recruit, Retain and Develop Youth Development Professionals	Climate	volunteer sense of belonging	Adult	Demographics	Counts and percentages	90% of all volunteers in the Central region feel that their contributions to 4-H are valued, 94% of white volunteers, 76% of LatinX, 70% of Asian, and 62% of African American volunteers feel that their contributions to 4-H are valued. % diverse volunteer feel that 4-H embraces DEI in programs, practices and policies
Recruit, Retain and Develop Youth Development Professionals	Climate	staff sense of belonging	Adult	Demographics	Counts and percentages	93% of all staff in the Central region feel that their contributions to 4-H are valued, 97% of white staff, 85% of LatinX, 83% of Asian, and 55% of African American staff feel that their contributions to 4-H are valued.
Clarify and Define Governance and Leadership Accountability	Infrastructure	Brand alignment	Organizational	State	Indicator	85% of Georgia counties have met requirements for use of 4-H logo

Clarify and Define Governance and Leadership Accountability	Infrastructure	Percent policies reviewed through equity rubric	Organizational	Function	Percent broken out by organizational function such as HR, program approval, resource allocation etc…	100% of policies related to resource allocation have been reviewed using the AEBC Equity Rubric
Clarify and Define Governance and Leadership Accountability	Infrastructure	Percent policies redesigned using equity rubric	Organizational	Function	Percent broken out by function such as HR, program approval, resource allocation etc…	50% of policies related to resource allocation have been revised or redesigned using the AEBC Equity Rubric
Clarify and Define Governance and Leadership Accountability	Infrastructure	Number of processes reviewed using equity rubric	Organizational	Function	Percent broken out by function such as HR, program approval, resource allocation etc…	100% of processes related volunteer recruitment and onboarding reviewed through DEI indicators
Clarify and Define Governance and Leadership Accountability	Infrastructure	Number of processes redesigned using equity rubric	Organizational	Function	Percent broken out by function such as HR, program approval, resource allocation etc…	100% of processes related volunteer recruitment and onboarding redesigned through DEI indicators
Develop and Strengthen New and Existing Partnerships	Community Engagement	Engagement	Organizational	Organizational Partner	Number	Number of events sponsored to engage diverse and marginalized communities.
Develop and Strengthen New and Existing Partnerships	Community Engagement	Number of new partnerships initiated	Organizational	Level, Demographics of partner leadership	Number of new partnerships broken out by organizational level. Inventory of partnerships by the leadership composition of partner organizations.	3 new partnerships in Georgia to provide programming and financial support for new urban 4-H programs. 66% of new partnership are women and/or led by diverse people

Diversify Funding Streams	Infrastructure	Composition of funding sources	Organizational	Level	Percent funding coming from different sources, broken down by organizational level	Funding sources have became more diversified between 2020 and 2025. In 2020 NIFA funds comprised 85% of 4-H funding. In 2025, overall funding increased by 32%, and NIFA's portion declined to 72%.
Diversify Funding Streams	Infrastructure	Budget allocation across programming types	Organizational	Program	Percent of funding allocated to different programming types	45% of Illinois 4-H funding allocated to club programs; 35% to in-school programs, 20% to after school programs
Incorporate DEI Principles into Programs	Access & Success	Enrollment	Youth	Demographics	Counts and percentages placed in the context of the population and or need for engagement	22% of youth enrolled in 4-H in the Northeast Region are LatinX, representing xx% of the community
Incorporate DEI Principles into Programs	Access & Success	Retention in 4-H	Youth	Demographics	Usually a crosstab of counts or percentages with a unit of time or number of opportunities they participate in	% of African American youth who returned the next year
Incorporate DEI Principles into Programs	Access & Success	Connection to community	Youth	Demographics, program type	Percentage volunteering in the community, chose projects meaningful to them, projects addressed issues in their community	88% of American Indian youth participants in Minnesota volunteered in the community in 2019

Incorporate DEI Principles into Programs	Climate	Connection to 4-H	Youth	Demographics, program type	Percentage responding affirmatively to survey questions such as: felt welcomed in 4-H program, have positive relationships with caring adults, worked together to solve a problem	93% of immigrant youth in Texas indicate they have positive relationships with caring adults in 4-H
Incorporate DEI Principles into Programs	Access & Success	Sense of self	Youth	Demographics, program type	Clear sense of what they want to do post-high school, can indicate how they want to be of service to communities in coming years, developed knowledge and skills in areas interesting to them.	74% of middle school aged African American youth in Missouri indicate they have developed knowledge and skills they are interested in
Incorporate DEI Principles into Programs	Education & Training	DEI learning/behavior objectives incorporated into annual review	Organizational	Role and Level	This is an indicator rather than a quantitative metric. Ideally 4-H will have reporting on youth, adult and organizational metrics to disaggregate them down to the program, state, regional, and national levels.	25 of 50 state programs have integrated DEI learning/behavior objectives into annual review for staff. Remaining states are vetting objectives with stakeholders
Incorporate DEI Principles into Programs	Education & Training	Percent of volunteers completing cross-cultural competency training	Organizational	Demographics	Percent	100% of new volunteers have completed cross-cultural training over the past two years
Incorporate DEI Principles into Programs	Education & Training	Percent of staff completing cross-cultural competency training	Organizational	Demographics	Percent	85% of all staff completed cross-cultural training using the Intercultural Development Inventory over the past 3 years