

Epsilon Sigma Phi – the Extension Professionals Organization

1970 - 2012

Epsilon Sigma Phi (ESP), the Extension Professionals Organization, is proud of its past and actively engaged in creating a preferred future. Begun in 1927 as an honorary fraternity by a handful of pioneer Extension Workers meeting in Montana, ESP continues to unite professionals of the Cooperative Extension System to cultivate and recognize excellence and foster productive relationships. From the outset the uniqueness of ESP among Extension professional organizations was the presence of Extension professionals from a broad spectrum of subject matter disciplines and administrative roles at the federal, state, regional and county levels.

Mildred Payne (Bokker), National Secretary-Treasurer, prepared a paper highlighting the accomplishments of the fraternity from 1927 to 1970. Her paper is available on the ESP National Web Site. This document by the Ad Hoc History Committee continues to report accomplishments up to 2012.

The report by Payne (Bokker) reveals these five major points of emphasis in ESP accomplishments:

- (1) Encouraging excellence among Extension professionals by recognition of excellence at state, regional and national levels.
- (2) Being the historian for the Cooperative Extension Service including supporting significant national landmarks.
- (3) Taking an activist role to strengthen federal support for Extension professional salaries and employee and retirement benefits.
- (4) Articulating the values of Extension professionalism through the Extension Workers Creed.
- (5) Being a champion for and providing opportunities and resources for professional development of Extension professionals.

Central thrusts since 1970

The very bedrock of Epsilon Sigma Phi is bringing together Extension professionals from all disciplines and echelons. “ESP is the sort of ‘non-denominational’ group of Extension

professionals”, said our former federal director Myron Johnsrud in a recent interview. “It is in ESP that we focus on being “Extension Professionals”.

Epsilon Sigma Phi continues the over-riding purpose to champion professional excellence. The recognition awards provided at the state, regional and national levels have expanded. Through the National ESP Endowment funds are available for professional development scholarships and grants. Epsilon Sigma Phi has greatly expanded the role as a provider of professional development through conferences and distance learning using emerging computer technologies.

History preservation and articulating the values of the profession continues. To spread the benefits of the Extension model around the world international work by Extension professionals is highly encouraged.

The advocacy activist role to obtain and maintain salaries and employee benefits faded to extinction. The efforts transitioned first to a Legislative Committee (prior to 1993) that reported to the membership federal action that would affect federal funding and employee benefits.

Since 1970 the changing environment for the Cooperative Extension System gave rise to essential shifts in organizational priorities and activities for Extension.

Recently reflecting on his term as ESP National President in 1973 -73, John L. Gerwig reports, “ESP some 40 years ago when I was the national president was strictly an honorary organization. Some states required at least 10 years of service before you could join. Only professional faculty and staff were eligible. Likewise the presidency was rotated among regions, as it is today, but it was then held only by administrators – usually the state director. The president was appointed by the other Extension Directors in the region whose turn it was to serve in this leadership role.

It was usually the Extension director from the various states that served as the voting member of their state at the national meeting, which was held during the annual Land-Grant Association meetings.

The Ruby Award was announced at the dinner and those in attendance were the Extension administrations and a small delegation from the state where the recipient of the Ruby Award worked.

As I recall, it was during the seventies that ESP started to emerge as having a national influential presence. The other agent associations were a little leery of having ESP grow into an influential organization. During my term of office, support and encouragement were given to the development of ESP as it is today. Subsequently support and encouragement continued within the organization and led to the eventual development of the Galaxy Conference concept.”

The movement to involve all Extension professionals in ESP national leadership roles, regardless of where they work in the county, area, statewide or Federal positions, has been a worthy accomplishment of the past four decades. The personnel of the 2010-2011 national board includes: A state family life and youth development specialist at Clemson University; County Extension Director specializing in small ruminant (sheep and goats) and international development at Farmington, UT; a regional director in Missouri; 4-H specialist in Maryland; community development specialist in Bismarck, ND; a county Extension director and agricultural specialist at York, PA; family and consumer specialist at Lyon County, Eddyville, KY and an area farm management specialist in Lewis County and surrounding area, Nezperce, ID.

The pendulum has swung the other way. Instead of national leadership dominated by state directors, efforts are underway to market ESP to state directors of Extension who often come from non-Extension backgrounds with little or no familiarity with ESP. More involvement from their ranks is desired to complete the hope of building relationships among all echelons and disciplines.

The Food and Agriculture Act of 1977 (Public Act 95 -113) as amended in 1981, outlined a broadened scope for Cooperative Extension programs. A special joint study committee was appointed to review and restate the roles and responsibilities of each of the partners in Cooperative Extension and to produce a document that would serve as a guide for the future mission, scope, priorities and policies of the Cooperative Extension. 1984-1985 ESP National President Gale VandeBerg headed the staff/design team for the project. [Wisconsin history – Page 119](#).

Six major areas of emphasis were identified: the agricultural system, natural and environmental resources, community and small business development, home economics/family living, 4-H/youth education and development and international concerns. Another major national study in 1986 brought about issues programming rather than plans of work based on individual academic disciplines.

As these two major national reports were implemented there were warnings admonishing Epsilon Sigma Phi to stay relevant in the changing environment within the Cooperative Extension Service. As a result the national leadership formulated eleven goals for the eighties shaping the activities of the organization. Knowledge of these goals for the eighties provides insight into the major re-organizational accomplishments that define the nineties for ESP. The goals as stated in the 1986 Officers' Handbook were:

1. An active chapter in every state and territory.
2. Increase membership in ESP to 12,000 (included life members).
3. All chapters to have one or more officers participating in regional officer workshops.
4. Active involvement of all life members (Extension retirees) in chapter programs.
5. Assist Extension workers in other countries to enhance their professional competence through a professional association.
6. Revitalization: National Board and all chapters examine current structure and organize for effectiveness.
7. Strengthen professional development of all Extension staff.
8. Redesign grants and loan program to meet the professional development needs of Extension employees.

9. Encourage every chapter to nominate individuals for the various award categories.
10. Provide leadership in assuring a fair and equitable employee benefits program for all Extension employees.
11. Provide leadership to improve the image of Cooperative Extension.

Gail Shellberg (CO), National President in 1987-88, provides these reflections on where Epsilon Sigma Phi stood in relationship to the transitions in Cooperative Extension.

“Flexibility Essential – Cooperative Extension was going through a period of transition and Epsilon Sigma Phi, an organization of flexibility, was a part of this transition. The flexibility of Epsilon Sigma Phi was its willingness to change. ESP can be likened to the butterfly and its cocoon. The cocoon has to let go before it can fly. The butterfly has only two choices – take a risk or die. Change is always a risk, yet it is the only way to shed the cocoon. ESP had always met the challenges of the past and this was true as the organization moved to the 21st century. ESP was flexible and willing to take risks.” [Top 3 reports](#)

History keeper

Epsilon Sigma Phi has been active in preserving the history of the Cooperative Extension System. The national organization published two books of Extension history. The first, THE SPIRIT AND PHILOSOPHY OF EXTENSION WORK was published in 1952. It is a collection of historic papers edited by R. K. Bliss (IA). The second, published in 1979, THE PEOPLE AND THE PROFESSION written by Ralph Reeder (IA) is based on interviews with pioneers and leaders in the Cooperative Extension movement in the United States. Reeder also drew upon chapter histories and records of the national fraternity. Both of these books were digitally preserved in 2011.

On the 75th anniversary observance of the Extension Service, ESP presented Myron Johnsrud, the Federal Extension Director at the USDA, a live oak tree to plant on the grounds at the USDA.

Epsilon Sigma Phi was one of the Extension organizations, which financially underwrote the writing and publishing of TAKING THE UNIVERSITY TO THE PEOPLE – SEVENTY-FIVE YEARS OF COOPERATIVE EXTENSION by Wayne D. Rasmussen.

Extension Professionals Creed articulates values of professionalism

Versions of the Epsilon Sigma Phi creed have articulated the values and beliefs of Extension's professionals. The creed was originally W. A. Lloyd's New Year's Greeting from the federal Extension office to county agricultural agents. It was adopted as the organization's creed at the first Grand Council Meeting in July 1927 in Reno, NV. The full text of the original creed is available in *THE SPIRIT AND PHILOSOPHY OF EXTENSION WORK*. (Page 357)

That first creed entirely focused on Extension's mission to develop scientific agriculture. The farmer's home, wife and children were assigned characteristics of sacredness. The right of farmers to a comfortable living was upheld. Extension workers were engaged in a profession to make the farm prosperous, the country home comfortable and beautiful and the rural community satisfying and their own life useful.

Myron Johnsrud participated in many national ESP gatherings during his tenure at the USDA. At the request of Nadine Hackler, 1990 national ESP president-elect, he spoke to the National Council gathered in Kansas City. He addressed the superior opportunities ESP for to encourage high standards of professionalism and ethics. He opened his remarks on the topic by saying, "Perhaps now is the time to re-examine the Extension Worker's Creed and assume that it sets appropriate professional standards for the 1990's and beyond."

The National Council accepted his challenge and approved a significant revision. The language of Extension "Workers" has been transformed to Extension "Professionals."

Revisions to the creed reflect changes in Extension priorities, educational trends and Federal laws governing Extension. All versions have paragraphs opening with "I Believe..." All references to the Christian God have been removed. The current creed is inclusive of all segments of the community and farming is not specifically mentioned. Applying scientific research to practical purposes continues. Intellectual freedom is specifically mentioned in the current version.

The creed has been part of the initiation ceremonies since the outset. A suggested chapter initiation ceremony published in 1986 says, "The soul of Extension is embodied in the Creed." A copy of the Creed suitable for framing was made available to members. They were encouraged to hang it in their office as a reminder of these beliefs. It is often read to open meeting and

conferences of all types involving Extension professionals. The current creed is available on Epsilon Sigma Phi's national web site. A video version was developed in connection with the 75th anniversary by the Texas chapter (Alpha Zeta).

During the 2008 national presidency of Duane P. Johnson (OR), the following detailed description of An Extension Professional was adopted which gives further meaning the Creed.

An Extension Professional

Epsilon Sigma Phi provides the following definition for an Extension Professional:

- Is trained, experienced and knowledgeable
- Is culturally competent and demonstrates the ability to work with diverse audiences in a variety of settings
- Exhibits excellent oral and written communication skills
- Manages, networks and collaborates to build alliances and partnerships
- Adheres to high standards of personal and professional ethics
- Demonstrates ability to work independently and is self-directed
- Is an effective team member
- Uses informational and education technology to accomplish goals
- Teaches in formal and informal settings as appropriate
- Is a lifelong learner
- Embraces and adapts to change
- Upholds the Land Grant mission and that of his/her University
- Is a scholar and demonstrates scholarship throughout his/her work
- Is nationally engaged with educational presentations, research and professional development
- Is a change agent, one who creates learning experiences that motivate and empower others to improve their life, family, business, community and world
- Is a recognized source of practical, researched-based educational information
- Maintains a positive attitude
- Treats, colleagues and stakeholders with respect

Recognition to encourage excellence

Epsilon Sigma Phi recognition programs have been an organizational keystone since the beginning. The number and nature of awards changed over the years. At the current time there are awards granted by state chapters and the national organization. Usually the awards are presented at a ceremonial event once each year in the individual states and the national conference. All national member recognition is determined by peers based on nominations submitted by chapters and then distributed for a voting process to each state chapter.

2011 national recognition

- National Distinguished Service Ruby Recognition - This is the most prestigious recognition presented by ESP to a member and is designed to recognize truly outstanding thinking, performance, and leadership in Extension. It is understood that the recipient has made highly significant contributions on the state, regional, national, and (when applicable) international Extension scenes in a variety of ways and over a career that spans a lifetime. The recipient gives the Ruby Lecture at the National ESP Conference. The lecture texts are preserved and posted on the national ESP Website. Review of the lectures over the years provides insight into trends, accomplishments and challenges of the national Extension System in the USA.
- National Distinguished Service Recognition - Gives national recognition to experienced Extension professional who have consistently exhibited continuing leadership, initiative, and excellence in Extension program planning, delivery, evaluation in program or administration, on a state or regional level, over a career of 20 or more years. Four awards are available annually on a regional basis.
- National Administrative Leadership Recognition - Gives recognition to Extension professionals who have primary administrative leadership responsibilities for county, regional, state, or program areas and who have shown noteworthy administrative enthusiasm, performance, and accomplishment during their Extension careers (10 years or more). Four awards are available each year granted on a regional basis.
- National Diversity/Multicultural Recognition (Individual and Team) - Acknowledges outstanding efforts and accomplishments of member or team whose innovative programming reinforces Extension's commitment to achieving diversity/multicultural programming within audiences and the organization. One team and one individual per region can receive this award annually.
- National Mid-Career Service Recognition - Provides recognition to a mid-career professional who has shown outstanding competence in Extension program planning, delivery, and evaluation in nominee's subject matter area or in administration on a regional or state basis (10-20 years tenure). One is award available per region annually.
- National Early Career Recognition – Recognizes members who have shown noteworthy enthusiasm, performance, and accomplishment in program design and delivery during

their early Extension career (less than 10 years). One award is available per region annually.

- National International Service Recognition - Bestows recognition to Epsilon Sigma Phi members who have contributed significantly to the development and/or expansion of an Extension program in another country or countries through in-state and/or overseas work. One award is available per region annually.
- National Team Recognition – This award accords the outstanding role by a team of educators in preparing people and/or communities to deal with critical issues, which address social, economic and/or environmental concerns. One award is available award per regional annually. ESP was the first JCEP partner to add a team award to their recognition program. This followed the move of Extension to issues programming with many projects involving professionals from a number of disciplines and subject matter specialties.
- National Continued Excellence Recognition - Designed to recognize an experienced member with more than twenty years of experience who has exhibited continued leadership, initiative, and excellence in Extension program planning, delivery, evaluation in program or administration, on a state, regional or national level five years after receiving the chapter Distinguished Service recognition. One award is available per region annually.
- National Visionary Leadership Recognition – Established to recognize members whose significant accomplishments have resulted in leading Extension forward in new directions. This member’s visionary leadership has enabled Extension to anticipate a significant new opportunity and developed support to implement program/organizational changes necessary to achieve success. One award is available per region annually.

Chapter recognition categories for members

State chapters have the opportunity to grant members equivalent awards of those listed above with like criteria defining success. The number of awards per category varies with the specific award.

In addition the professional tenure awards as Extension professionals are available at the chapter level. New retirees are honored with certificates when they move on their new status in

relationship to the profession. They are urged to become life members of Epsilon Sigma Phi by making a single dues payment of five times the national annual dues.

Each chapter has the opportunity to develop annual awards of outstanding service from an Extension retiree who has continued membership in ESP. This chapter award is designed to recognize continuing contributions and outstanding service by retired Extension professionals.

Some state chapters have added their own recognition to these categories.

Awards – beyond the membership

State and national recognitions are available for Friends of Extension. This is the highest recognition presented by ESP to volunteers or a business or organization and their leaders and is designed to recognize truly outstanding support and express appreciation for involvement in Extension efforts. Up to three recognitions are available annually. The honored Friends of Extension are urged to attend the ESP National Conference to receive the award and make brief remarks at the awards ceremony. This is a very special time for the chapters who make the winning nominations to share the conference experience with dedicated supporters. An equivalent award is available at the chapter level.

Many of Extension professionals' colleagues are very competent support personnel. At this time these support personnel and paraprofessionals are not eligible for ESP membership. This nationally authorized recognition is designed to pay tribute to the many staff in our system that, over time, have shown support for the mission, program, and professional staff of Cooperative Extension System. Such persons include secretaries, program assistants, camp directors, motor pool managers, public distribution clerks, print shop operators, budget analysts, computer operators and others. Since each Chapter designs the specific criteria for this recognition, there is considerable flexibility in how chapters bestow this recognition.

Loan Fund

In 1948, the national Epsilon Sigma Phi board began making loans to members on study-leave to help finance graduate study to secure advanced degrees. This loan venture had been under

consideration since 1941. The adoption of the loan program was deferred until the end of World War II based on the belief that it would be inappropriate to ask government employees to leave their positions for one or two years of study leave during a time of national warfare.

The documents of Epsilon Sigma Phi indicate that at the time of initial implementation of the loan program, leaders of the organization believed that the program would provide a source for loans for members to finance graduate study thereby furthering the profession of Extension and would increase the revenue from invested funds of Epsilon Sigma Phi. The amount of interest earned from the loans would be equal to or greater than that available in war bonds or other investment products available at that time.

Their initial two-year loans ranged from \$400 - \$600. Interest charges were 2% the first year and 4% the second year. Later the amount of the loans was increased and the interest rate was determined by the interest earned on certificates of deposit.

In 1982 a separate loan fund of \$20,000 was set aside to cover the loans. Minor changes were made to the terms of loans and interest rate were made in the next decade.

As it became less common for graduate students to be given leave for fulltime study, the loans were also made available to part time students pursuing advanced degrees. Over the life of the program loans were made to 151 members. In the 1980's more loans were made than for any other decade. Fifty-one loans were made in that decade. From then on the popularity of the loans sharply declined. Only 16 loans were used from 1992 – 2000. The loan fund was discontinued and the funds became part of the ESP Foundation. The repayment history for the loans was excellent. A few "hardship" compensations were made.

Epsilon Sigma Phi National Foundation – Endowment

Early consideration of a foundation with endowed fund earnings to finance scholarships, mini-

grants and other professional development activities took place when George Gist (OH), 1978-79 national president, was in office. Gist appointed an Ad Hoc National Epsilon Sigma Phi Foundation Study Committee to explore possibilities for a national foundation. Members of the committee were Dick Lee (MO), Chair, Betty Bay (SEA – Extension), Dick Walter (MN), and Cordell Hatch (PA). This committee’s report states, “The Committee believes that the idea of a National Epsilon Sigma Phi Foundation has merit and recommends that the national Council appoint a committee to consider the opportunity in greater detail.” (November 12, 1978 report of committee.)

That report led to the appointment of a second Ad Hoc Foundation Study Committee by succeeding National President Cordell Hatch (PA). Members of the committee were Chairman, Dick Lee (MO), Janice Breiner (?), Bea Rubenstein (?) and Dick Walter (MN). (October 2, 1979 report of committee). The committee’s study reversed the results of the one the previous year. Their main recommendation was that no National Epsilon Sigma Phi Foundation be established at this time. According to their report many chapters already had foundations, other professional associations to which members belonged had similar foundations with which ESP would compete for contributors and it would be too heavy a burden for the National Headquarters to manage a national foundation. They concluded the best action would be for the National Council to aid existing chapter foundations by preparing guidelines to strengthen those foundations or establish new ones. Thus, the national foundation project “struck dry ground”.

Even though there was not a “go-ahead” recommendation from the second as-hoc study committee, continuing discussions pointed out the need to obtain certified 501 C-3 charitable status from the Federal Internal Revenue Service. The **earlier governance** documents declared ESP as not-for-profit but the IRS official certification had not been obtained. (Minutes National Board Nov. 6-7, 1982). During the following two years, with national leadership from Robert Clark (WI) the new Executive Secretary-Treasurer and National President Jessie E. Francis Epsilon Sigma Phi became a certified by the Federal Internal Revenue Service of the United States 501 C (3) organization. Therefore donors would be allowed a tax deduction for contributions.

Despite the earlier cautions and descent, support for a foundation grew until on November 8,

1984 the historic resolution creating the Epsilon Sigma Phi National Foundation was placed on the agenda of the National Council. Wayne Bath (WA) presided at that National Council meeting in Denver, CO. The measure passed thus creating the Foundation. It was chartered and incorporated as a Wisconsin not-for-profit corporation as part of Epsilon Sigma Phi, the National Extension Fraternity. "A milestone of the November 1984 National Council meeting was the incorporation of the National ESP Foundation. Foundation funds were to provide opportunities for professional growth and development for Extension staff. In 1986, the first professional development awards were given by the newly-established foundation," wrote 1985 – 1986 National President Anne Rideout. (Top 3 letters).

To facilitate the dreams of national ESP leaders before and immediately after the creation of the Foundation, Anne Rideout further reports, "The Foundation's commitment to excellence was through scholarships and loans for professionalism courses at short-term Extension schools, on-the-job experiences such as those in supervision and administration, publication of the latest literature and educational aids on leadership, and strategies for improving the image of the Extension profession with the academic community and by the public at large."

"Generous donations were given by individuals, and state chapters established plans to provide a foundation endowment of \$100,000 (\$10 per ESP member by 1990) for scholarships, loans, internships, apprenticeships, and travel-study grants to support professional excellence."

1984-85 National President Gale I. VandeBerg (WI) a very enthusiastic supporter of the Foundation. He was an early and generous Foundation contributor along with other leaders. The profit from some of the sales of his memoir book was donated to the ESP Foundation. In that autobiography, BEYOND THE HORIZON – LIFE ON A WISCONSIN FARM 1880-1940 AND A FARM BOY'S CAREER, he writes:

"The national Extension Fraternity, Epsilon Sigma Phi (ESP), during my terms as its president, established a national Foundation for the enhancement of professionalism in Extension. The goal is an endowment of \$100,000. We started the drive with an "I'm a 10" slogan including buttons with that slogan to wear to events. The objective was to get \$10 from each of the 10,000 members. I started with my own contribution of \$1000 to this Foundation. I also agreed to serve on a continuing basis as an advisor to the ESP Board for investments of the Foundation fund." [Page 325](#)

Major early financial contributors to the Foundation in addition to VandeBerg were: Clarence Cunningham (OH), Robert Clark (WI), Goerge Gist (OH), Nadine Hackler (FL), Marvin Anderson (IA), Patricia Powley (PA), Richard Angus (MD), Gail Shellberg (CO), Patricia Buchanan (IL), Meatra Harrison (TX) and *others*.

The enduring vision for the Foundation (and later the Development Fund) is:

Epsilon Sigma Phi has a commitment to future excellence through the Development Fund to:

- Provide scholarships for professional improvement to individuals and mini-grants to chapters.
- Support internships to give new on-the-job experience in supervision and administration.
- Publish the latest literature on professionalism and professional development opportunities for Extension faculty/staff.
- Prepare resource materials that chapters can use to emphasize professionalism to prospective members.
- Update and maintain a record of Epsilon Sigma Phi history and encourage chapters to implement Extension history projects.

During the first ESP national professional development conference in San Antonio, TX, a scholarship auction was held. The auction has become an annual tradition. Chapters and national board members contribute the items for the auction. Conference attendees have a pleasant evening engaging in fun fund raising. The auction proceeds are used, along with Foundation earnings, to finance the scholarships, mini-grants and other professional development pursuits by members and chapters.

The climax of each auction is the selling of a hand carved ESP emblem made by former national board member Art Redinger (IN). He selects wood from the state tree of the outgoing national president. Often with the financial assistance of their state chapter, the out-going national president buys the key signed by each national conference attendee for a significant amount.

In 1997 the original Foundation charter in Wisconsin was relinquished by action of the National Council. Since then the Foundation and the Fraternity operate under a single charter. In 1999 the National Council voted to form a Board of Trustees, appointed by the National Board to manage the Foundation Funds. The immediate past chair of the Resource Development and Management Committee served as chair of the trustees. No current National Board member could serve as a trustee. Trustees were ESP members with excellent expertise in effective investment strategies to meet the goals of the fund for risk tolerance and revenue.

As the size of the portfolio increased, the National Board deemed it would be wise to engage professional investment council. After a few years of study, the Board of Trustees was discontinued with Standing Rule Change (11.12.05 - O) in 2005. The funds expended for the operation of the Board of Trustees became available to pay the cost of professional investment advisors who could watch the financial markets more closely. Paton and Paton, Inc. were secured as the investment advisors.

The major fund raising campaign for the endowment fund was “rolled-out” at the National Conference in 2002 in Lexington, KY. Members of the task force conducting the campaign were: Richard Angus (MD), Chair, Sue Buck (WI), Bill Braden (TX), Richard Garrard (ID), Mark Gateley (TN), Jim Hovland (WI), Jim Lindquist (KS), Bonnie McGee (TX), Margaret Viebrock (WA), Bernadette Watts (NC) and Linda Cook (FL). This was a “blue ribbon” group of members with vast leadership experience in Epsilon Sigma Phi. The new campaign was off to a good start.

In 2003 the Foundation name was changed to Epsilon Sigma Phi National Endowment Fund (AKA the ESP Development Fund). A goal of \$500,000 in pledges and contributions was set for 2007. Clearly, only investment earnings will be used to ensure that the principal stays in place for future generations of Extension Professionals.

To help reach a projected goal for an endowed fund of at least \$500,000, each chapter was asked to name an Endowment Chair to give leadership to the state chapter effort. The goal was within reach until issues with the economy and investments caused a setback. The original goal is still

in sight and annually the efforts continue to reach the original goal.

Donor recognition levels were identified in the Endowment Campaign. Richard Angus (MD) earned the highest level, ESP Diamond Key, for \$25,000 or more. There are no donors at the ESP Platinum Key level for \$15,000 - \$24,999. At the ESP Gold Key Madeleine Greene (MD), Alberta Johnston (OR), James Lindquist (KS), Bonnie McGee (TX), and Patricia M. Tengel (MD) garnered level (\$5,000 - \$14,999) recognition. There are 34 donors at the level of Silver Key (\$1,000 - \$4,999). Other giving classes are Bronze Key (\$500 - \$999) and ESP Key (\$250 - \$499) reached by more numerous givers.

In February 2009 planned giving programs were defined applicable to wills and estates.

Currently the Development Fund funds the following items annually:

- 4 - \$600 Public Issues Leadership Development Conference Scholarships - \$2400 – One is the Mike Mc Kinney named scholarship: McKinney Public Issues Scholarship can be used for PILD but not mandated. It is \$500 and will be available for 4 or 5 more years.
- 4 - \$500 Administrator/Leader Scholarships - \$2,000
- 4 - \$1,000 Mini-Grants for Professional Development available to state chapters- \$4,000
- 4 - \$500 Richard R Angus Professional Development Scholarships - \$2,000
- \$2,000 for the recognition program to buy the plaques, certificates, frames, etc. for awards

Journal of Extension

As most Extension professionals were required to have graduate degrees and were earning faculty or similar status at Land-Grant universities it became apparent that there was a need for a refereed research journal. This led the way to the “birth” of this 48 year-old referred research journal.

The *Journal of Extension (JOE)* expands and updates the research and knowledge base for U.S. Extension professionals and other outreach educators to improve their effectiveness. *JOE* also serves as a forum for emerging and contemporary issues affecting U.S. Cooperative Extension education.

JOE is a refereed journal featuring research reports relating to Extension education. Research submissions undergo double-blind review, and the editor, Dr. Laura Hoelscher, reviews commentary and tools of the trade submissions.

Epsilon Sigma Phi gave \$1,000 in start-up venture capital for this publication in 1963. Since the outset ESP has been represented on the Board of Directors for the publication. Those representatives have been: Kendra Wells (MD), Deborah Maddy (OR), Diane Brown (PA), Bill Braden (TX), Kathryn Treat (NM), Ralf Graham (KS) and others. The National Council provides the travel expense support necessary for these representatives to attend JOE board meetings.

In 1993 Epsilon Sigma Phi (Annual Report) provided a mini-grant to the **Journal of Extension**, which supported an electronic journal study and recognizing the role of the **Journal of Extension** in professional improvement for all Cooperative Extension faculty. JOE is now an entirely electronic publication universally available via the Internet.

In the 2010 ESP National Annual Report, Kendra Wells wrote about the accomplishments of JOE:

“ 2010 *JOE* Scholarship and Rigor:

*203 submissions as of 9/8/10 (second-highest all-time submission rate)

*Increased number of articles per issue from 29 to 32 to reduce number of articles waiting to be published

*Current acceptance rate 34%

*84 reviewers, selected by the Editorial Committee, provide double-blind review

**JOE* will once again be indexed in ERIC (Education Resources Information Center)

*An on-line review system for *JOE* is being investigated”

Professionalism course at Minnesota Extension Summer School

To promote excellence and professionalism among Extension faculty nationwide, Epsilon Sigma Phi sponsored a keynote address and credit course at Minnesota Extension Summer School in 1992. The course resulted from creative collaboration between the Professionalism committee and the Center for Professional Development, University of Minnesota Duluth. The committee

developed the prospectus for the course. The ESP Foundation provided partial funding. (*Number 51 and 52 – ESP National Newsletter*)

Reorganization with broader mission and organizational structure

ESP has become predominately a professional development educational entity leading the Extension System professionals as public educators since the mid-eighties. There is no clear line of demarcation on a timeline between the old and new eras but there are definite stepping-stones to report for the journey. According to Past President, Laurel Kubin (CO), a very significant act took place in 2000 when the National Board designated Epsilon Sigma Phi as “The Extension Professionals Organization”. The marketing study in 2007 and 2008, resulted in further action to entirely remove the tag line “Honorary Extension Fraternity” from all but legal documents dealing with the chartering of the national honorary fraternity.

The Food and Agriculture Act of 1977 (Public Act 95 -113) as amended in 1981, outlined a broadened scope for Cooperative Extension programs in the counties. A special joint study committee was appointed to review and restate the roles and responsibilities of each of the partners (USDA, State Land Grants and county governments) in Cooperative Extension and to produce a document that would serve as a guide for the future mission, scope, priorities and policies of the Cooperative Extension. . Six major areas of emphasis were identified: the agricultural system, natural and environmental resources, community and small business development, home economics/family living, 4-H/youth education and development and international concerns. Another major national study in 1986 brought about issues programming rather than plans of work based on individual academic disciplines.

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- Assist Extension workers in other countries to enhance their professional competence through a professional association.
- Revitalization: National Board and all chapters Examine current structure and organize for effectiveness.
- Strengthen professional development of all Extension staff.
- Redesign grants and loan program to meet the professional development needs of Extension employees.
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“Flexibility Essential – Cooperative Extension was going through a period of transition and Epsilon Sigma Phi, an organization of flexibility, was a part of this transition. The flexibility of Epsilon Sigma Phi was its willingness to change. ESP can be likened to the butterfly and its cocoon. The cocoon has to let go before it can fly. The butterfly has only two choices – take a risk or die. Change is always a risk, yet it is the only way to shed the cocoon. ESP had always met the challenges of the past and this was true as the organization moved to the 21st century. ESP was flexible and willing to take risks.”

Believing in the importance of strong local chapters, the national organization emphasized avenues that could lead to that end. In 1989 work started on a major revision and updating of the Officers’ Handbook. Leadership was given by Glenda Herman (NC) to complete this long and involved project.

There were nearly 11,000 ESP members who were making significant progress toward a high standard of excellence.

To further define a pathway for the developing reorganization and restructuring, a National Futures Task Force was formed to formulate a strategic plan for Epsilon Sigma Phi. Members of this national ESP task force were: Pat Buchanan, (IL), John Cooper, (TX), Ann Keim, (WI), Chair Mitch Owen, (NC), Lois Goering, (OR), Madeleine Greene, (MD), Laurel Kubin, (CO), Mark Manno, (DE,) and Greg Passewitz, (OH).

By the end of Pat J. Buchanan's term as national president in 1993, the strategic planning process was completed. The following mission and value statement was officially adopted:

Mission Statement

Epsilon Sigma Phi (ESP) is dedicated to fostering standards of excellence in the Extension System and developing the Extension profession and professional.

Our Vision Statement

Epsilon Sigma Phi leads the Extension System in promoting and supporting professionalism in Extension

The National Council approved a new governance structure. Summarizing the changes a new position of Second Vice-President rotating to National President in two years was added to the National Board. The former standing committees were disbanded. It was determined that the new structure would result in more efficient communication, be more open and transparent and committee chairs would be elected by the National Council. In the former structure all those chairs served by appointment by the National President. Members of the National Board chaired the new standing national committees. New standing committees were: Professional Development, Chapter Relations, Public Affairs, Member Services, Membership Recruitment & Retention, Global Relations, and Resource Development and Management. Membership on the standing committees for limited length of terms was obtained through nomination from state chapters leading to appointments each year by the national president.

Pat Buchanan and Laurel Kubin created a new national chapter handbook that was a guidebook for most national and chapter activities. It was released in 1994. Updates were circulated to

chapters annually – first in hard copies, and then on CD’s and with the creation of the national web site 1997 it eventually became available only electronically.

In the ensuing 16-17 years there have been minor changes in this committee structure. By 2011 the former Member Services Committee name had been changed to Scholarship, Grants and Recognition. A new Marketing Committee was made a Standing Committee (2009) chaired by the Second Vice-President. The job descriptions of the President-Elect and Second Vice-President were improved to fit with the national ESP plan of work calendar. The President-Elect became chair of the Professional Development Committee and the chair of the national conference. The Second VP became chair of Chapter Relations and Marketing Committees.

By 2004, during the presidency of Robert Ohlensehlen (ID), National Second VP Nancy Crago (PA) was given the task of working with a committee of 12 ESP members from across the country to evaluate the current programs of ESP on the National level to determine if the organization was meeting the needs of members and to study the future needs of members. Members serving on this strategic planning committee were: Ellen Varley (MD), Eleanor Wilson (USDA); Gretchen Ferenz (NY), Stacey Warner (KS), Judy Villard (OH), Mark Russell (IN), Mike McKinney (FL), Della Baker (SC), Sara Anderson(AK), Janice Stimpson (ID), Phil Rosenlund, (WY), and Debbie Amundsen (UT). Their resulting final report accepted in 2005 during the presidential term of Jim Hovland (WI) stated these eight objectives to guide the organization’s program for the next five years:

- Development of Chapter Leader Training Modules placed on the web site and updated annually.
- Create a life member track of seminars and activities for National Conference.
- Conduct an assessment of how life members are involved at the chapter level.
- Create a new organizational “tag” line replacing the Honorary Fraternity.
- Create a new logo for a “fresh” new look.
- Upgrade and improve marketing.
- Promote the use of technology to provide addition professional development training for members.
- Increase emphasis on professional development at the national conference.

All of newly proposed objectives have been implemented and expanded they were adopted.

Epsilon Sigma Phi engaged in strategic analysis, using an Alignment Model, to prepare its new five year strategic plan in 2010. The overall purpose of the model is to ensure strong alignment among the organization's mission and its resources to effectively operate the organization. The Board reviewed the previous strategic plans as well as other previously developed documents to determine important issues to be included in the new plan. In addition, the Board considered needs and concerns that were identified by persons attending the 2010 JCEP Leadership meeting.

At its 2010 Mid-year Board Meeting, the Board began its strategic planning process by reviewing its strategic "philosophy," revisiting the organization's mission, vision and values statements. The process included a look at various strengths, weaknesses, opportunities and threats regarding the organization. Issues identified in the current strategic plan, futuring document and comments from the discussions at JCEP Regional Meetings were grouped into common categories. Topics or themes were assigned to each category. The Board developed the major goals and strategies for the organization based on these themes. The plan provides guidance for budgeting and operational planning over the next five years.

Core Ideology

Mission Statement

Epsilon Sigma Phi (ESP) is dedicated to fostering standards of excellence in the Extension System and developing the Extension profession and professional.

Vision Statement

Epsilon Sigma Phi leads the Extension System in providing and facilitating professional development that focuses on the Extension organization and the Extension professional.

Preferred Future

Epsilon Sigma Phi envisions the characteristics and needs of the organization's future and potential annual and life members, and innovatively and resourcefully responds to those needs. Epsilon Sigma Phi is recognized as the Extension system provider and facilitator of professional development that focuses on the Extension organization and roles of the

Extension professional. Epsilon Sigma Phi will provide national leadership in leadership development for Extension professional associations.

Core Values

Values are descriptive words that communicate the core priorities, attitudes, styles, and beliefs in the organization's culture, including what drives members' priorities and how they truly act in the organization, etc. The Board identified the following four core priority values.

- Professional excellence
- Leadership development
- Belief in the Extension System/Public Education
- Serving people through education

The Board identified the following four strategic goals to guide the work plans for the next five years.

1. Promote internal and external communications
2. Provide sustainable organizational leadership
3. Provide and enhance professional development opportunities to members
4. Provide for the fiscal integrity of the organization

Stand-alone national conferences

Prior to 1993 the annual national council meetings and recognition events were held in conjunction with Association of Public and Land-grant Universities annual meetings. The Ruby Lecture was delivered to this group. The local chapters hosted the awards banquet.

By early 1990 interest developed for a solely professional development conference that would include opportunities for Extension's many graduate students and faculty members to present scholarly papers. The rigors of presenting research results at a juried conference were becoming requirements to obtain and be advanced in University faculty status for field and university-based Extension staff members.

After considerable exploration the first “stand alone” professional development conference for ESP was held in San Antonio, Texas in 1993. President Pat J. Buchanan (IL) presided. These professional development conferences have continued annually for 17 years. In 2001 the national conference was cancelled due to the bombing of the National Trade Center in New York City and the Pentagon in Washington DC. At these conferences, the National Council meeting of state delegates is conducted, national committees meet, national and regional recognition bestowed and the Ruby Lecture presented.

The full 3-4 day program of professional development, includes preconference in-depth leadership workshops, scholarly concurrent sessions, keynote speakers of national renown, poster sessions, a Scholarship Auction and other fellowship activities. Opportunities to travel to sites of interest in the host region are integrated into the conference program. In recent years extra effort has been made to include aspects in the conference program that meet the needs and interest of retirees (life members).

A state chapter hosts these conferences. As of 2011 conferences had been held first in San Antonio, TX, followed by Milwaukee, WI, Spokane, WA, Annapolis, MD, (1996 & 2006) Atlanta, GA, Indianapolis, IN, Salt Lake City, UT, Lexington, KY, Moline, IL, Colorado Springs, CO, Charleston, SC, Fargo, ND, Jackson Hole, WY and Syracuse, NY. Attendance is usually about 250, including life and active members and guests. The other three conferences have been JCEP Galaxy Conferences (Cincinnati, OH; Salt Lake City, UT; and Indianapolis, IN). Past ESP Presidents Patricia Powley (PA) and Margaret Viebrock (WA) were co-chairs at two of the Galaxy Conferences.

The National Council pays a travel stipend for state delegates and members of national committees plus registration fee scholarships are available for early career members, outstanding Extension administrators and others.

Joint Council of Extension Professionals (JCEP)

Starting in 1965, the national Extension Committee on Organization and Policy (ECOP) in its desire to build mutual understanding, improve communication and relations between County Agent Associations and Extension (*federal partner*) established the “ECOP Sub-Committee on Agents’ Associations.” (*Source: June 25, 1980 correspondence from Genevieve N. Harris, EHE and Chair of the ECOP Subcommittee on Agents’ Association.*) ECOP requested that the invited three agent organizations name two representatives. In addition the sub-committee was comprised of two state Extension directors and one Federal Extension representative. Epsilon Sigma Phi was not included.

The leadership of Epsilon Sigma Phi believing their organization would add strength to the sub-committee and receive strength in return, petitioned for inclusion but the sub-committee did not support the request. The refusal of support letter dated June 25, 1980 reports: “We believe that it is important that our National Honorary Fraternity remain unencumbered to exercise the option not open to the three professional associations.” ESP was actively involved in obtaining and protecting Federal employee benefits at that time. According to Gail Shellberg, ESP past national president and executive secretary, the national ESP leadership was very disappointing. Disappointed but not discouraged, ESP leadership continued to cooperate with the agent subcommittee as “windows of opportunity” emerged. When the ECOP sub-committee was transitioned to the National Council of Extension Professionals in 1989, Epsilon Sigma Phi was granted full membership. Clarence Cunningham (OH) and Patricia Powley (PA) were the first ESP representatives. (The council was renamed the Joint Council of Extension Professionals.)

Their national president-elect, president and past president represent each Joint Council member organization. (Each member organization pays all the travel expenses of their representatives to be involved in JCEP. Member organizations in 2011 are Epsilon Sigma Phi, National Association of Extension 4-H Agents, National Extension Association of Family and Consumer Science, National Association of County Agricultural Agents, Association of Natural Resources Extension Professionals, National Association of Community Development Extension Professionals. Plus there is a representative from the Association of Public and Land-Grant Universities (APLU), one from the Extension Committee on Organization and Policy (ECOP), and also one representative of the National Institute of Food and Agriculture (NIFA) -- U.S. Department of Agriculture (USDA).

The JCEP mission statement clarifies the essence of this very beneficial coalition of Extension professional organizations and ECOP partners. JCEP is the center of the Extension profession and a partnership of Extension professional associations:

- doing what each cannot do effectively alone,
- building leadership and collaboration,
- providing professional development and scholarship opportunities, and
- advocating for excellence in the Extension profession.

In response to a request for her impressions about the accomplishments of JCEP, Ellen Burton, past national president of ESP and JCEP, wrote:

“JCEP provides the leadership for the following conferences:

--**Galaxy Conference**--held once every five years is a joint national conference

--**Public Issues Leadership Development Conference**-- (PILD) held annually in Washington, D.C.

--**Leadership Conference**--held annually in different parts of the country. (This conference replaced the Regional Leadership Workshops held for each winter in four locations; then held yearly in two locations--this occurred for two years; and now there is one annual conference.)”

“Past Presidents of each association serving on the JCEP Board are invited by ECOP to participate in ECOP's Leadership Conference--held in different locations throughout the country. In addition to the associations past presidents, ECOP invites Directors and other administrators to attend this meeting. The meeting is always looking to the future and becomes a place where new ideas can be discussed. It also provides the opportunity for association past presidents to share their concerns and learn what is happening at the federal level.”

“BUT--to me one of the greatest benefits of JCEP is the opportunity to build cooperation and collaboration with other Extension professional associations. TRUST is either built--or not built--as the Board works together on the projects of JCEP. JCEP also speaks with one voice for the six associations with NIFA or ECOP. There can be strength in numbers.”

Global Relations

The accomplishments of the standing committee dedicated to Global Relations are difficult to report in measurable terms. In general the committee's goals since the beginning in 1993 have been to interest members to engage in the process of the "internationalization of Extension" through study, teaching in other counties, emersion travel and chapter activities to broaden members' perspectives of global issues and opportunities. Since 2001 the work has been done through links with web sites of organizations dedicated to international purposes accessed thru the ESP national web site. Serving on this standing committee has been a process of expansion of personal perceptions of opportunities and benefits by collaborating with a variety of professionals with international service interests.

The Global Relations Committee has a very admirable record of generating articles for the national ESP newsletter to tell the story of the international work experiences of many Extension professionals. There have been many concurrent sessions with an International focus at national conferences.

The Global Relations Committee is collaborating with Dan James (TX) and Mike McKinney (FL) who will lead international study tours for members and friends. ESP's role in this effort is publicity to the membership, especially retirees. Both James and McKinney have had extensive International experiences.

Mike McKinney has directed two international cruise experiences that ESP promoted to the membership, plus their family and friends.

Epsilon Sigma Phi Website History

Billy Warrick (TX) and Mike Gearst (TX) originated the ESP national website. Warrick was a participant in a concurrent session at the 1996 national conference in Spokane, Washington. The

need to communicate electronically by providing information from the national organization to all of the members was identified as a high priority.

Warrick agreed to return home to Texas to see if it would be possible to establish a website to be on the Texas A & M system to serve the needs of national ESP. Joining forces with his colleague Mike Gearst at Texas A & M the original system was developed, perfected and expanded over a twelve year span. Warrick continued as the Webmaster. From the outset chapter leaders could access the national chapter handbook on the web site making it much more efficient to have access to the latest updates. A significant part of the website featured Warrick's accomplishments as the photographer at National Conferences. His work capturing the education, recognition, networking and socialization of our members has become a part of the history to the organization.

The original server was set up to serve as a centralized website for the Epsilon Sigma Phi Chapters across the nation. The goal continues for the ESP homepage for every state chapter and the national chapter housed at one site for easy access.

In 2007 the National Board and the Marketing Committee embarked on a new look for Epsilon Sigma Phi. The new look included an updated marketing plan for ESP. The result included a new logo and style manuals that provide chapters and members with guidelines for communications and supporting materials for the organization. Steppingstone, LLC was hired to help update the image and marketing program for the organization. As a result of the updated marketing a major change has been made to the ESP website.

National Executive Director Bob Ohlensehlen became webmaster in 2009. Site upgrades resulted in a highly interactive site with opportunities to submit chapter reports, conference registrations, scholarship applications and recognition applications using an online system which was a part of the website. Supplies could be ordered online directly from the national office. The site has become a depository for increasing volumes of information about Epsilon Sigma Phi and provides links to many related organizations and information sources.

Distance Learning Professional Development

ESP stepped into the world of being a distance-learning provider by transmitting the national preconference workshop to local Extension downlink sites. Starting in 1995, Margaret Viebrock (WA), chair of the national conference in Spokane, made the arrangements to uplink the national preconference workshop from the Covey group featuring Craig Pace via satellite to potentially every Extension office with downlink capabilities. This was technical “stretch” for the host hotel. Using her perfected skills at making effective arrangements, Viebrock made this happen engaging private TV broadcast equipment.

In 1996 at Annapolis, MD, the Covey group with Craig Pace presenting again contracted with ESP. Viebrock and contracted technical expertise and equipment vendors again turned the hotel ballroom to a TV studio. It was an amazing innovative fete done well.

A year later in Georgia, Bernadette Watts (NC) developed a very interesting program for the conference attendees and satellite TV audience featuring Charlotte Roberts from the Peter Senge group. Their subject matter focus was on building a learning organization in the 21st century.

Chuck Bell (OH) handled arrangements for the fourth professional development downlink and preconference workshop in tandem with Purdue University. The featured presenter was Denis Waitley. The theme was The Future-Proof Leader: Effectively Managing Change and Balancing Professional and Personal Priorities in the Knowledge Century.

“Returning to Our Roots: The Engaged Institution”, a report by the Kellogg Commission on the future of state and Land-Grant universities, suggested seven characteristics of an engaged institution: (1) being responsive, (2) having respect for partners, (3) maintaining academic neutrality, (4) being accessible, (5) integrating service with teaching and scholarship, (6) coordinating activities (7) and maintaining resource partnerships. The 1999/2000 National Professional Development Committee solicited video-tapes from states about Extension outreach projects that fulfilled these characteristics, especially the integration of service with teaching and

scholarship and being accessible. The tapes were peer reviewed by the professional development committee selecting 28 “Blue Ribbon” tapes that were included in the pre-conference downlink video broadcast via satellite. Laural Kubin (CO) and Faye Strickler (PA) worked with the tech staff at Utah State University to put together and present this unique and excellent program.

Each of these down linked conferences was made available to Extension professionals on videotape upon request.

The National Epsilon Sigma Phi Foundation funded the cost of the down linked conferences in excess of revenue generated from on-site registration fees and user fees at the site of the down linked video broadcasts.

In 2006 the Ruby lecture was made available off-site by video streaming on the Internet from the conference site in Maryland.

The Emerging Leadership Sub-Committee of the Professional Development Committee provided two professional development opportunities using Internet inactive technology. In 2007, Dave King, Oregon State University and Janet Poley, American Distance Learning Educational Consortium presented “Five Things You Need to Know about Distance Learning. A year later “Advocacy at All Levels: Leading Extension into a Vibrant future” featured Dr. Gwen Wolford, The Ohio State University.

Life members

For nearly two recent decades the membership ratio between life (retired) members and members who were active employees has hovered around 50/50. A reader of this report of accomplishments probably has the impression that most ESP programs and projects are for the active employees.

This disparity has been a major concern of ESP national leadership since 2000. Even earlier, the state and national leadership discussed it. Since life member task forces have worked at identifying opportunities for more service and opportunities for life members. As a result retirees interests have been emphasized at national professional development conferences. Special efforts have been exerted to include life members on national standing committees and board.

An Ad-Hoc Life Member Committee made recommendations to the 2010 National Board to enhance the quality of life membership in ESP. Further consideration of their recommendations is a high priority for the 2011 national board.

There are wonderful examples of national leadership by life members. Pat Boyle (WI) served as national president after retiring from the University of Wisconsin. He inspired his national board and committees to take innovative approaches to their leadership roles. Pat Borich (MN) was a regional VP after retiring. Eleanor Wilson (USDA) has continued her national leadership roles into her retirement. Ellen Burton (IL), Duane Johnson (OR), Dick Angus (MD), Patricia Powley (PA), and Mike McKinney (FL) are life members who remained active in national leadership. Betty Moore (AL) is a regular attendee of national conference. Shellberg, Carlson, Cook and Ohlensehlen were national executive directors following their Extension retirements.

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