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[Return to Current Issue](#)

Regionalization With or Without Specialization: A Call for a National Research Agenda

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Abstract: More research is needed to help states evaluate Extension delivery model alternatives. Given funding trends, access to all programs requires regional systems with county offices. The traditional county model provides access to an office but only to some programs. While there will be many differences, only states with specialized educators can make sufficient program investments to increase public value and funding. Stakeholders exploring regionalization need to know about the successes and failures of the early adopters. The implementation of a national agenda of high-quality research on regionalization and specialization is needed to protect Extension's historic mission.

Introduction

Extension is facing tremendous budget pressures. States are proposing budgets for FY2012 that are about 10% below 2008 inflation-adjusted levels (Leachman, Williams, & Johnson, 2011), and Extension will share some of this pain. Likewise, major cuts in federal government spending for Extension are likely. At the same time, the demand for new university outreach educational programs is growing.

This commentary reviews four broad policy options that state Extension units face and concludes that the only way for a state to ensure program access for people in all counties is to shift from a county to a regional delivery system. Further, the analysis concludes that regional delivery systems in which educators cover more counties, but do not specialize in a specific area of expertise, cannot make sufficient investments in program quality to protect the mission of Extension. After briefly citing the current research related to regionalization with specialization, this commentary posits that survival of Extension depends on additional, high-quality, independent research that helps us learn which types of regional systems contribute most to Extension's historic mission.

Options for Dealing with Extension Funding Cuts

Extension has four options for dealing with deep funding cuts. These are:

1. Attempting to avoid cuts by political pressure on funders;
2. Cuts in programs or geographic coverage;

3. Regionalization of program delivery, without specialization; or

4. Regionalization of program delivery, with specialization.

Political Pressure Option

A number of states are already encouraging their stakeholders to contact legislators with pleas to restore funding cuts. Increasing demands for public funding of other public services during times of scarce resources makes this option less viable than in the past.

Program or Geographic Cuts ("Reducing Access") Option

In a county delivery model, this option reduces access to some program areas (Agriculture and Natural Resources [ANR], Youth Development [YD], Family Development [FD], and Community Development [CD]) in many counties. While local stakeholders often want one educator in each program area, this would require 3,400 more educators nationally, an increase of 40% over 2009 (USDA, 2009). If specific areas of expertise (AOEs), such as Crops, Livestock, Horticulture, ABM, etc., are considered rather than program areas, and the average number of AOEs used in Alabama, Iowa, and Minnesota (14) are assumed, the national shortfall is already 33,000 educators in the county delivery model.

Regionalization, Without Specialization ("The County Cluster") Option

Having an Extension office in every county guarantees access to an office but does not guarantee access to all programs or to expertise from all AOEs. To provide better access, some states (Iowa, Minnesota, Nebraska, Ohio, and Wyoming) started adopting a regional delivery system based on county clusters in the 1980s (Morse, Markell, O'Brien, Ahmed, Klein, & Coyle, 2009, pp. 37 â 40).

In this model, educators cover a number of counties, sometimes working in several program areas. As Bartholomew and Smith (1990) pointed out, county cluster educators incur the stresses of multiple sets of committee meetings, mail, and phone calls. Minnesota educators found the work outside their host county was not matched by a corresponding reduction of work in their own home county (Hutchins, 1992). Regionalization without sufficient specialization results in educators working much harder just to keep up and without time for serious investments in new programs. Some county commissioners also were upset that "their" educators worked outside the host county.

Regionalization, With Specialization ("The Regional and County") Option

Even regionalization without specialization does not ensure access to programs that require in-depth expertise. However, regionalization with AOE specialization by educators on statewide program teams provides access throughout the state for all programs. Further, this leads to economies of scale that allow educators to invest in program quality, which is essential to building public value and funding (Kalambokidis, 2004; Morse et al., 2009, Chapters 2 & 10 to 13). Starting in 2004, three states (Minnesota, Alabama, and Iowa) shifted to policies that encourage AOE specialization. Next, I briefly explore these policies.

Policies to Support Area of Expertise Specialization

"Our educators are much more specialized than they were a few years ago," is a claim made by nearly every state. However, "specialized Extension educators" has many definitions. Prior to 2004 in Minnesota, the phrase "educators specializing in community development" was an oxymoron because two-thirds of them worked 4 out of 5 days in other program areas (Morse et al., 2009, p.108). Further, none of them had academic training or experience in economics. After 2004, the 18 full-time specialized CD educators worked either in the community economics AOE or in the leadership and civic engagement AOE and had Master's degrees in relevant fields.

Five policies have been used by Alabama, Iowa, and Minnesota to encourage specialization by regional educators. These include the following.

- a. Separating the funding of regional educators and county educators;
- b. Specialization of educators within an area of expertise rather than by a program area;
- c. Hiring educators with Master's degrees related to their area of specialization rather than in any field;
- d. Supervision by specialists in the area of expertise rather than by supervisors who cover everyone in a geographic area; and
- e. Opportunities for counties to contract for local positions.

Yet there are major differences among these three states. Regional Extension Educators (REEs) in Minnesota are housed in 16 regional centers rather than in the 87 county offices, while both Alabama and Iowa have the REEs in county offices. Ninety percent of the Minnesota ANR REEs work statewide, while the Alabama ANR educators focus on regions with about 12 (of 67) counties. Needs assessment in Iowa is run by the 20 regional directors, while Minnesota program teams do this using a market research approach (Morse et al., 2009, pp. 179 - 185). Do these policy differences lead to differences in outcomes? Or are the differences unimportant?

Additional Research Needed Soon

Most states that wish to provide in-depth expertise throughout their state will find it necessary to develop regional delivery models. While these regional models will vary widely due to unique aspects in each state, there probably will be commonalities among states, just as there were with the county model. States will be able to learn from each other if there is sufficient, high-quality, and timely research done on the consequences of different types of regional systems.

To date, there have been nine articles published on the county cluster models (Bartholomew & Smith, 1990; Hutchins, 1990 & 1992; Rockwell, Furgason, Jacobson, Schmidt, & Tooker, 1993; Cropper & Merkwitz, 1998; Leholm, Hamm, Suvedi, Gray, & Poston, 1999; Leholm, & Vlasin, 2006; Schafer, 2006; Bitsch & Thornsbury, 2010). Another four articles compare the outcomes of the county cluster and the more specialized regional and county model (Morse & Klein, 2006; Schmitt & Bartholomay, 2009; Morse et al.,

2009; Ahmed & Morse, 2010). There are short descriptions of new regional systems on my blog "Economics in Cooperative Extension" (Morse, 2010). While each of these articles provides valuable insights into prior regional efforts, none of these articles contrasts and compares the results across states. None empirically test hypotheses about the consequences of specialization on outcomes, while controlling for other factors.

Many major questions need further study, including the following.

- a. How do different regional systems influence the degree of specialization by regional Extension educators (REEs)?
- b. How do variations in specialization by REEs affect program quality, scholarship by REEs, collaboration between educators and campus faculty, and access to programming?
- c. Can program business planning, market research, public value communications, and in-depth program evaluation be widely and successfully used in states without extensive specialization?
- d. How do outcomes of regionalization and greater specialization change over time?

This research should be done by academic researchers who have complete autonomy and use the most rigorous theoretical models, quantitative data, and multivariate statistical analyses. Yet these researchers need to collaborate closely with an advisory team of internal and external Extension stakeholders. This research has many benefits to the states that have not yet adopted any regional model. Hence, national institutions, such as NIFA, ERS, or foundations, should fund most of the research.

What if this research is not undertaken soon? Some states will try political pressure to restore funding, but have very limited success. Some states will struggle along with a county model and growing gaps in access, leading to a downward spiral of less participation and public funding. Others will try to adopt a regional model in order to improve access and public value. However, without stronger research to document the outcomes, I expect about half of the states will face such strong political backlash from apprehensive staff and current external stakeholders that their efforts will fail. Each state that fails weakens the entire national Extension system.

Will researchers tackle these questions? If so, will Extension pay attention? Given Extension's history as a learning organization, I am optimistic that both will tackle these soon and continue Extension's historic mission of "taking the university to the people" (Rasmussen, 1989).

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