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Opportunities and Threats Created by Extension Field Staff Specialization

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Abstract: Public expectations are rising, and budgets are falling for many public services, including the Cooperative Extension System (CES). Economists suggest specialization of CES educators is one means of handling this dilemma. This article examines changes in the opportunities perceived by Minnesota educators of moving from a cluster-county form of specialization to a regional/county model. The initial results are encouraging, suggesting statewide specialization generates opportunities for greater teamwork, better needs assessment, and higher program quality. Additional research, which includes other stakeholders and other forms of specialization, could benefit states as they face increasing public expectations and fiscal constraints.

Introduction

The Cooperative Extension Service system is being pressured to do more with less. McDowell (2004); Bull, Cote, Warner and McKinnie (2004); and Hoag (2005) argue that Extension's survival depends on addressing new societal problems and reaching new audiences. While McGrath, Conway, and Johnson (2007) suggest, "Extension is the best organization in the world at scholarly engagement," they despair that neither Extension field staff nor campus faculty have incentives to work closely together on scholarly engagement. Hoag (2005) suggests that program teams need to focus more tightly on public goods and competitive advantages, follow good business practices, carefully target audiences, document results, and build political support. At the same time, resources for Extension are declining (Ahearn, Yee, & Bottum, 2003; JTFMCP, 2006). Recently, it was even suggested Extension might go the way of the pony express if it does not change faster (West, Drake, & Londo, 2009).

As early as 1989, there was evidence that county Extension agents had lost credibility with commercial farmers (Ford & Babb, 1989). An agricultural dean professed: "We found that regular county Extension agents can no longer cope with the highly technological and specialized nature of farm problems" (Thompson & Gwynn, 1989).

Economists suggest the answer to this dilemma lies not in working harder but in increasing productivity via specialization or division of labor (Smith, 1776). For over 30 years, national Extension leaders have called for greater Extension field staff specialization (Slocum, 1969; Hildreth & Armbruster, 1981; Thompson & Gwynn, 1989; Agnew, 1991). Alabama, Illinois, Minnesota, Nebraska, Ohio, Oregon, and Wyoming have attempted to encourage specialization using the county cluster model of regionalization and have experienced mixed results (Bartholomew & Smith, 1990; Tondl, 1991; Hutchins, 1992; Rockwell, Furgason, Jacobson, Schmidt, & Tooker, 1993; Suvedi, Lapinski, & Campo, 2000; Schafer, 2006). Most of these states, including Minnesota until 2004, used a county cluster model, with educators located in one county also working in several neighboring counties. As of early 2009, no other state has adopted a regional/county model with the characteristics found in Minnesota.

Schmitt and Bartholomay (2009) report on the effects on job satisfaction and effectiveness for agricultural educators as Minnesota moved from the county cluster model of specialization to the regional/county model of specialization. This article extends the Schmitt and Bartholomay work by exploring the perceptions of regional educators in Minnesota, from all program areas, on changes in opportunities because of the increased specialization.

Survey Methodology

To examine empirically the differences in county cluster and regional/county models of specialization, the authors surveyed 129 Regional Extension Educators (REEs) about their work in 2001 and 2006. During 2001, the educators operated under a county cluster model, and, in 2006, they had been working for 2 years in the new regional/county model. These years were clearly before the 2002 reorganization and clearly after the 2004 reorganization, avoiding the confusion during the transition. Unlike the Schmitt and Bartholomay study, the one reported here focused only on REEs and not local Extension educators, because almost all of those were in agriculture.

To facilitate the discussion, the new delivery structure in Minnesota is called the "regional/county model." However, it reflects a complete bundle of policies that compliment regionalization. The Extension educators working out of regional Extension centers are called "Regional Extension Educators" even though that title has now been changed to "Extension Educator (in area of expertise) for reasons explained later. The terms "REE," "Extension educator," and "educator" are used interchangeably.

The survey asked questions about the educators' work focus, scholarship and research, teamwork, program quality, collaboration with tenured faculty, geographic responsibilities, and experience. A draft of the survey was circulated among several Extension staff to determine face and content validity. The 43-question survey required an average of 30 minutes to complete and had a response rate of 79%. The 102 regional educators responding were representative of all five of the program centers in Minnesota Extension as shown in Table 1. Three steps were taken to ensure reliability.

1. The survey was pre-tested with eight individuals, using the approach recommended by Dillman (1978, pp. 155-158).
2. Demographic questions omitted the specific area of expertise, which would have allowed identification of individuals when combined with other characteristics.

The survey was administered by the University's Office of Management Services (OMS), which removed all individual identifiers before providing results to the authors. This anonymity allowed respondents to be more candid in their responses, increasing the reliability of the results.

Table 1.
Response Rate by Program Center, Minnesota Extension, 2007

| Program Centers | Number Regional Educators | Percent of total Regional Educators | Percent of Respondents in Survey | Response Rate by Program Center |
|--------------------------------------------------------------------------------------------------------------------|----------------------------------|--------------------------------------------|-----------------------------------------|----------------------------------------|
| Agriculture, Food and Environment | 38 | 30% | 29% | 79% |
| Community Vitality | 19 | 15% | 14% | 74% |
| Family Development | 26 | 20% | 22% | 85% |
| Natural Resources and Environment | 19 | 13% | 12% | 71% |
| Youth Development | 29 | 22% | 23% | 83% |
| Total | 129 | 100% | 100% | 79% |
| Note: Data in columns 1 and 2 are from the University of Minnesota Extension Human Resources Directory (May 2007). | | | | |

Features of Extension Field Specialization

When Minnesota's Extension Service moved to the regional/county delivery system in 2004, it adopted eight new policies to accommodate greater specialization of Minnesota's Regional Extension Educators (REEs). These eight policies are described below.

1. Each REE's primary work was focused around one of 16 Areas of Expertise (AOE).
2. REEs were required to hold graduate degrees closely related to the AOE.
3. The size of geographic area covered by the REE was guided by the location of the target audience, rather than county boundaries.
4. REEs' salaries were funded almost entirely from state and federal funds and supplemented through fees and sponsorship, so that county dollars are expended for local positions of the county's choosing.

5. Offices for REEs working in a region were moved to newly established regional centers. County-based REEs remained in county offices.

6. Supervision of both REE and County Extension Educators shifted to program leaders who are subject matter specialists, rather than geographically based supervisors who supervised staff from all program areas.

7. Each REE became a part of a statewide program team that included campus faculty. Each program team works together to develop a program business plan.

8. Evaluation for REE promotion was refocused to six criteria with enhanced emphasis on scholarship, program leadership, and teaching.

Table 2 outlines the major policy differences before and after the 2004 restructuring. Additional detail on these policies can be found in articles by Morse and O'Brien (2006), Morse (2006), Morse and Klein (2006), Morse and Ahmed (2007), Klein and Morse (2007), Schmitt and Bartholomay (2009), and Morse (forthcoming).

Table 2.
Specialization of Minnesota Regional Extension Educator, Before and After 2004

| MN Extension's Policies to Encourage Specialization | Before 2004 Restructuring (County Cluster Model) | After 2004 Restructuring (Regional/County Model) |
|------------------------------------------------------------|------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| Focus on Areas of Expertise (AOE) | REEs self-selected their AOE and often work in other AOE's. | REEs are selected by a program leader to work within that AOE. |
| Degree Requirements | Graduate degrees were required, but were often from fields unrelated to AOE. | Degree must be related to the AOE as determined by the program leader. |
| Geographic Area | REEs were assigned to counties, with 25 percent of time assigned to work in "county clusters." | Geographic assignment depends on the location of the audience, the specialization, and the number of REEs in the AOE... |
| Source of Funding | All positions had 25 to 40% funding from counties. | All REEs' salary, travel, and support funded by state and federal funds. Counties completely |

| | | |
|------------------------|--------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| | | funds local positions. |
| Office Location | REEs were located in county offices | REEs are housed in regional offices. County educators are located in counties. |
| Supervision | REEs were supervised by district directors. | REEs are supervised by campus faculty or specialists. |
| Program Teams | REEs sometimes participated in teams but there was no requirement. | All REEs are required to be part of one or more statewide program teams. |
| Program Business Plans | No requirement. | Teams required to develop business plans. |
| Promotion | Criteria focused on program management, engagement, and service. | Primary criteria: teaching, leadership, and scholarship, with continuing attention to previous criteria. |

The most tangible change is the geographic area covered (Table 3). Note that over half of REEs now have statewide responsibilities compared to less than 10% before 2004. This was a major reason for shifting the title of REEs to "Extension Educator" in (name of their area of expertise). Without 4-H REEs, nearly 2/3 of the REEs have statewide responsibilities. The 4-H REEs each serve only 2 or 3 counties because of their supervisory role to 4-H Program Coordinators (who are University of Minnesota Extension employees but fully paid by the counties).

Table 3.

Number of Counties Covered by Percent of Minnesota Extension Educators in 2001 and 2006

| Counties Covered | Before Restructuring in 2001 (Educators hired in 1999 or before) | After Restructuring in 2006 | |
|----------------------------|------------------------------------------------------------------|-----------------------------------|------------------------|
| | | Educators Hired in 1999 or Before | All Regional Educators |
| 1 to 2 | 36 | 5 | 5 |
| 3 to 4 | 22 | 12 | 15 |
| 5 to 6 | 15 | 3 | 3 |
| 7 to 86 | 18 | 30 | 30 |
| Entire State (87 counties) | 9 | 50 | 47 |

| | | | |
|---------------------------|----|----|-----|
| Number of Respondents (N) | 74 | 74 | 102 |
|---------------------------|----|----|-----|

Both travel time and commuting time increased substantially as REEs took on more regional and statewide responsibilities. The average commuting distance increased by 17 miles from 2001 to 2006, from an average of 10.9 to 28.5 miles. Further, 26% of respondents cited travel time and commutes as a disadvantage of the new system. However, the average commute of those hired after 2004 was only 18.9 miles, so the commuting time may diminish as older REEs who accepted reassignment retire and new REEs are hired. Recently, Minnesota Extension has adopted a more liberal telecommuting policy as well as new efforts on distant education programs.

Do Opportunities Change Due to Specialization?

The public value and support for Extension programs depends on high-quality programs (McDowell, 1985; Kalambokidis, 2004; Archer, Warner, Miller, Clark, James, Cummings, & Adamu, 2007). Keeping in mind a holistic view of program quality, we asked about aspects of educators' job that would be considered important to program quality. To measure Educators' perceptions of how opportunities changed resulting from specialization, they were asked, "Since 2004, to what extent has increased specialization resulted in increasing opportunities in the following areas: (areas listed in Table 4)?" Educators rated the effects of specialization on opportunities for their work in 14 areas on a five-point Likert scale, ranging from much fewer to many more. By no means is our list exhaustive, but it covers salient points on how specialization can affect program quality. Because each of the items listed in Table 4 is deemed a "desirable" in strong outreach programs, reports of fewer or much fewer opportunities were interpreted as problematic.

Results indicated that educators felt that specialization created greater opportunities in 12 areas, mixed results in one area, and clearly problematic in one area. In Table 4, the results are reported only for "established educators," who were hired in 1999 and continued with Extension through 2007 because they had experience both the county cluster model and the new regional/county model.

Table 4.

Opportunities from Specialization, Based on the Question, "Since 2004, to What Extent Has Increased Specialization Resulted in Increasing Opportunities in the Following Areas?" Percent of Minnesota REEs, 2006

| Nature of Opportunity | Much Fewer | Fewer | Same | More | Much More |
|--------------------------------------------|------------|-------|------|------|-----------|
| Needs Assessment | | | | | |
| Learn about our target audiences | 0% | 8% | 30% | 47% | 15% |
| Adjust to new needs | 4% | 14% | 26% | 47% | 9% |
| Integrate audience feedback | 0% | 11% | 42% | 39% | 8% |
| Develop close relationships with audiences | 26% | 19% | 16% | 27% | 12% |
| Teamwork | | | | | |

| | | | | | |
|------------------------------------------------------------------------------------------|-----|-----|-----|-----|-----|
| Provide statewide program leadership | 3% | 3% | 18% | 43% | 34% |
| Work as part of a team | 1% | 7% | 30% | 41% | 22% |
| Work with state specialists | 1% | 19% | 31% | 26% | 23% |
| Work with other areas of expertise | 35% | 31% | 22% | 9% | 3% |
| Focus | | | | | |
| Focus on my area of expertise | 1% | 7% | 16% | 27% | 49% |
| Focus on our program's target audiences | 0% | 7% | 24% | 46% | 23% |
| Teaching and Scholarship | | | | | |
| Do Extension teaching | 11% | 9% | 39% | 20% | 20% |
| Do scholarship on my programs | 4% | 5% | 19% | 47% | 24% |
| Program Quality | | | | | |
| Develop and deliver high quality programs | 4% | 1% | 32% | 31% | 31% |
| Earn respect from my audiences | 3% | 8% | 35% | 34% | 20% |
| Number of respondents (N) = 74, all regional Extension educators hired in 1999 or before | | | | | |

The answers of new educators are reported in Table 5, as well as by the number of counties covered and whether they were consulting their program business plans frequently. Results are not reported by program area or area of expertise to protect anonymity.

Table 5.

Percent of Minnesota REEs Reporting "More" or "Much More" Opportunity by Starting Date, Counties Covered, and Use of Business Plans

| Nature of Opportunity | REEs by starting date with Extension | | REEs by Number of Counties Covered | | | REEs Using Program Business Plans Frequently |
|----------------------------------|-----------------------------------------|--------------------------------|------------------------------------|---------------|--------------|----------------------------------------------|
| | 1999 or before: "Established Educators" | 2004 or after: "New Educators" | Six or fewer | Seven or more | Entire State | |
| Needs Assessment | | | | | | |
| Learn about our target audiences | 62% | 68% | 57% | 68% | 60% | 76% |

| | | | | | | |
|--------------------------------------------|-----|-----|-----|-----|-----|-----|
| Adjust to new needs | 57% | 68% | 52% | 52% | 65% | 80% |
| Integrate audience feedback | 47% | 53% | 48% | 52% | 46% | 65% |
| Develop close relationships with audiences | 39% | 53% | 30% | 42% | 44% | 57% |
| Teamwork | | | | | | |
| Provide statewide program leadership | 77% | 79% | 74% | 77% | 79% | 91% |
| Work as part of a team | 62% | 63% | 65% | 65% | 60% | 72% |
| Work with state specialists | 49% | 68% | 48% | 58% | 52% | 50% |
| Work with other areas of expertise | 12% | 47% | 22% | 13% | 23% | 26% |
| Focus | | | | | | |
| Focus on my area of expertise | 76% | 79% | 57% | 71% | 85% | 91% |
| Focus on our program's target audiences | 69% | 74% | 57% | 77% | 73% | 87% |
| Teaching and Scholarship | | | | | | |
| Do Extension teaching | 41% | 42% | 30% | 39% | 44% | 43% |
| Do scholarship on my programs | 71% | 63% | 52% | 68% | 77% | 76% |
| Program Quality | | | | | | |
| Develop and deliver high quality | 62% | 68% | 57% | 68% | 63% | 78% |

| | | | | | | |
|--------------------------------|-----|-----|-----|-----|-----|-----|
| programs | | | | | | |
| Earn respect from my audiences | 54% | 68% | 48% | 52% | 58% | 72% |
| Number of Respondents (N) | 74 | 19 | 23 | 31 | 48 | 46 |

Needs Assessment

Quality programs depend on dealing with relevant problems in a timely fashion. By large margins, REEs reported specialization gave them more opportunities to learn about their new audiences and adjust to new needs (Table 4). About half of the established REEs reported more opportunities to integrate audience feedback into programs, but only 11% reported fewer (Table 4). New educators and those on teams that actively used the program business plans reported even greater opportunities on all the above aspects (Table 5).

In contrast, REEs had mixed reactions about opportunities to develop a close relationship with audiences (Table 4). Overall, 45% of the established REEs reported fewer opportunities on this compared to 39% reporting more (Table 4). However, every group, except those REEs serving six or less counties, had a greater number of REEs responding with more rather than fewer opportunities to develop close relationships (Table 5). A possible explanation might be that REEs needed to redefine "audience" in the new system from "geographic communities" to "communities of interest" or specific target audiences.

In the county cluster system, most REEs worked primarily in their home county and generally lived in the community where they worked and developed widespread social capital simply by being an active member of the community. In the new system, REEs attempted to work regionally in the same manner as they did in the county, which is not plausible. The social capital needed by REEs has to be developed with targeted audiences over the entire state or large regions, requiring an intentional strategy. As REEs adjust their focus on their target audience and enhance skills in developing social capital, perspectives could change.

Teamwork

Specialization, almost by definition, requires teamwork, with each member of the team working in her area of comparative advantage. The established REEs reported that teamwork increased considerably over the prior county cluster model, with increased opportunities for statewide leadership, working as part of a team, and working with state specialists (Table 4). REEs on teams that used their business plans more frequently also reported more opportunities for statewide leadership and teamwork (Table 4).

However, there was one area of teamwork that nearly all educators, with the exception of the new ones, saw as diminished by the new specialization: the opportunity to work with other areas of specialization (Table 4 and 5). To shift to specialization, program teams needed a plan to focus on a particular area of expertise and target audience.

During 2004 and 2005, Extension administration required statewide program teams to develop program business plans to make this shift and to encourage campus faculty and field staff to work as teams. While the process of building teams within each AOE was successful, there was no intentional process to build teams

across AOE. REEs were told they could develop programs across areas of expertise if they developed a program business plan, yet this was not common at this early stage. Some areas of expertise had faculty from several different academic disciplines. For example, the crops areas of expertise had faculty from agronomy, soils, entomology, and agricultural engineering. As original teams have matured, Extension administration has explicitly encouraged and even pushed for more collaboration across AOE.

Focus

Focus is a primary feature of specialization. There was wide agreement among the REEs that specialization had allowed them to focus on their area of expertise and focus on their program's target audience (Table 4). Focus was greater among the REEs working in the larger regions and those on teams actively using their program plans (Table 5).

Teaching and Scholarship

Forty percent of the established educators reported more or much more opportunities to do Extension teaching (Table 4). While this is lower percentage than for other items, this is probably due to greater teamwork in teaching.

Program scholarship provides the research base for building new programs and provides feedback on the effectiveness of existing ones. Seventy-one percent of the established REEs reported more opportunities to do scholarship because of specialization (Table 4). Educators covering the entire state reported more opportunities on scholarship than those serving smaller areas (Table 5). Additional scholarship is not surprising because the new system allows REEs greater focus, more teamwork with campus faculty, and stronger promotion incentives to do scholarship.

Program Quality

We asked educators directly how specialization has affected their ability to develop and deliver high-quality programs. Sixty-two percent of the established educators and 78% of educators who used their program business plans frequently reported specialization provided them with more opportunities to develop and deliver high-quality programs (Table 5).

Higher quality programs should lead to greater respect from audiences. Almost half (49%) of the REEs who had worked under the old system reported more opportunities to earn respect due to the new level specialization. While similar gains were reported by other groups, the new educators and those using the business plans reported higher levels (Table 5).

Conclusions and Policy Implications

Does the type of specialization of Extension educators influence their levels of productivity? Does the type of specialization help make programs more relevant to audience needs, increase program teamwork, and ultimately enhance program quality? The purpose of the study reported here was to examine one aspect of these questions from the perspective of Extension educators who had worked as field specialists under a county-cluster model until 2004 and under Minnesota's new regional/county model. The study explored the perceptions of Extension educators on how opportunities change by increased specialization after the new system had been in operation for 3 years.

Several features distinguished Minnesota's new statewide specialization model from the cluster model:

- Over five times as many Extension field specialists work statewide in the new system;
- All are located in regional offices rather than county offices;
- Funding for regional educators is entirely from state and federal sources;
- All field educators are supervised by campus state specialists; and
- Promotion criteria for REEs have a much greater emphasis on scholarship.

When Minnesota REEs were asked, "Since 2004, to what extent has increased specialization resulted in increased opportunities," they reported major increases in opportunities related to needs assessment, teamwork, focus, teaching and scholarship, and program quality. Probably the most important result is that nearly two-thirds of the established educators (those working under both systems) reported more (31%) or many more (31%) opportunities to develop and deliver high-quality programs; this compares to only 5% reporting fewer opportunities. On 11 of the other 13 items, the percentage of REEs reporting more opportunities was greater than those reporting fewer.

Based on the responses of the regional educators, it appears that Minnesota Extension's regional/county model was working fairly well by 2006, 2 years after it started. The hypothesis that the specialization of Regional Extension Educators in the regional/county will result in greater productivity is consistent with the opinions of the majority of Minnesota regional educators. Yet these results are just the tip of the iceberg. It is necessary to see how these results hold up over time and address many other questions. For example, how do different types and levels of specialization influence:

- Reactions of other stakeholders, including campus state specialists, program participants, county and state officials, and taxpayers;
- Access to Extension programming around the state;
- Ability of Extension to secure grants, charge fees, or obtain sponsorships;
- Capacity of program teams to evaluate programs;
- Peer-reviewed scholarship of program outputs, outcomes, and impacts; and
- Demand for county funded or based educators?

A number of these issues are being studied for Minnesota, comparing the current regional/county model with the earlier the county cluster model (Morse, forthcoming). Comparative research across the states with other specialization/regional models would provide a richer data set and insight. This might allow examining what

types of policies are necessary to support different types of specialization.

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