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## The Extension Hedgehog

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## The Extension Hedgehog

### Abstract

Extension is competing for money, attention, and a place in the future of higher education. It is critical that Extension identify its education niche, specialties, and the value that only Extension adds to learning. Extension must mature in its role by coordinating issues-based education from a total university base. Issues-based education is inherently collaborative and non-hierarchical. Extension should be at the forefront of the modern outreach and engagement movement. But what are we passionate about, what can we be the very best at in the world, and how do we effectively attach our work to its economic drivers?

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Reoccurring public dollars available for higher education are in short supply. The current economic climate has placed significant pressure on the budgets of federal, state, and county governments. In turn, those governments demand that Extension defend the continued funding of its programs. Extension is competing for money, attention, and a place in the future of higher education. It is critical that Extension identify and communicate its education niche, its specialties, and the critical value that only Extension adds to learning. Public policy decision-makers at all levels ask questions like the following (Figure 1).

**Figure 1.**  
Questions Asked by Public Policy Decision-Makers

- How do Extension programs differ from what is offered by campus-based research and teaching faculty?
- How does Extension differ from what is offered by the many other informal, community-based educational organizations?
- Is Extension still needed now that research-based information and distance education is widely available to rural (as well as urban) communities on the Internet?

- Is Extension education the most efficient way to reach emerging communities and underserved audiences?
- What are the costs and the benefits of Extension education relative to other community based education programs?
- Should Extension programs that primarily benefit individuals be supported by public education dollars?

We often hear that to justify our budgets, we need to do a better job of documenting and communicating the relevance and impact of our programs. The call for outcome-based educational funding has been repeated every 5 to 10 years for decades, every time we experience a significant economic recession. Questions about the relevancy of Extension, however, go deeper and must be addressed by a larger vision.

It is often said that Extension engages Land-Grant universities with ordinary people and real world problems, and that this adds to Extension's appeal. Is this still a compelling vision? We believe that the future of Extension and the Land-Grant university system as a whole will depend, in part, on how well we listen and respond to the real issues facing our clientele (Fehlis, 2005; McDowell, 2004).

Following the recession of 2003, Oregon State University (OSU) Extension initiated a planning process that began with the formation of a "futures task force." The 2004 OSU Extension futures task force built on past efforts by the Extension Committee on Organization and Policy (ECOP), which concluded that to be successful the Land-Grant university system must do the five things (Russell, 1991) listed below (Table 1).

**Table 1.**  
Five Things the Land Grant University System Must Do

<b>Re-Examine Its Institutional Commitment to the Public service mission.</b>	Should all research, teaching, and Extension faculty members be accountable, at some level, to scholarly engagement?
<b>Identify and Address Vital Issues</b>	Identify and address the vital social, economic, and environmental issues relevant to the communities where the university is located.
<b>Deliver Issues-Based Programs</b>	Overcome barriers to multi-disciplinary research and education by delivering issues-based research and educational programs and initiatives.
<b>Re-Examine the Academic Reward and Recognition System</b>	How does academic reward and recognition affect the willingness of faculty to engage with local communities and implement the public service mission?

ECOP further argued that Extension--the offspring of the school of agriculture--must be allowed to mature in its role by coordinating issues-based public service programs from a total university base (Russell, 1991). Issues-based research and education is inherently collaborative and non hierarchic. Extension, which has its roots in the interdependency models of education, should be at the forefront of the modern outreach and engagement movement.

## Articulating the Extension Hedgehog

In order to advance the work of ECOP, the OSU Extension 2004 futures task force applied "hedgehog analysis" to the future of Extension education. The hedgehog concept comes from the book *Good to Great* (Collins, 2001). In a manner similar to *In Search of Excellence* (Peters & Waterman, 1982) and other books that evaluated a selected subset of companies and drew conclusions from the findings, the *Good to Great* study focused on companies that suddenly diverged from their cohort, dramatically out performed the other companies in their business sector, and sustained the performance for over 15 years. Eleven companies were selected. These 11 companies held in common their ability to recognize, understand, and articulate what the authors refer to as their "hedgehog."

The hedgehog concept evolves from a children's story. Even though the fox is smarter and faster, the hedgehog always defeats the fox. The hedgehog only knows one trick, but it knows that trick very well. No matter what tactic the fox tries, the hedgehog rolls up in a thorny ball and outwits its enemy. An organization finds its "hedgehog" by pursuing three lines of inquiry (Figure 2). At the

intersection of the three inquiries is the organizational hedgehog.

**Figure 2.**  
Lines of Inquiry to Find the Organizational Hedgehog

1. What are we passionate about? What are we "called to do?"
2. What can (or cannot) we be the very best at in the world?
3. How do we effectively attach our work to its economic drivers?

### What Are We Passionate About?

Extension educators share in common with successful teaching faculty a sincere desire to make a difference in the world by sharing knowledge, conveying skills, and helping people grow in their capacity to learn. Extension educators do not, however, choose to teach credit courses in a classroom. We choose to teach in an informal, community setting where the focus is on learning and the distinction between the "teacher" and the "student" is not rigid. The voluntary nature of Extension educational relationships is powerful because it demands the highest quality teaching and listening applied to subject matter that is highly relevant to the student.

➤ *Extension Agents are passionate about informal, voluntary, community-based education.*

But we must not use the above as code words for haphazard engagement. Haphazard engagement is no longer competitive or merchantable in the market for learner services. Extension distinguishes itself from the many other informal, community-based educational programs by taking a more scholarly approach. Glassick, Huber, and Maeroff (1997) described a scholarly approach that can be applied to research, teaching, and Extension programs. They describe what we mean by scholarly engagement (Table 2).

**Table 2.**  
Description of the Scholarly Engagement Process

<b>Review the Literature</b>	Begin new Extension research and education programs by reviewing what others have tried; what works or does not work; and what are the key questions being addressed in the field.
<b>Define Measurable Objectives</b>	Start by articulating measurable objectives and developing a specific plan for measuring progress.
<b>Choose Appropriate Methods &amp; Analysis</b>	Review the research and education methods that have been used by others in addressing the issue or problem of interest. Be prepared to justify your choice of methods.
<b>Challenge Your Assumptions</b>	Take an experimental approach. Don't assume that your research or educational approach will work. Test it.
<b>Practice Reflective Critique</b>	The vital social, economic, and environmental problems that we tackle in Extension are long term and complex. Progress is incremental. At regular intervals and at the end of our work, determine what worked or did not work and what questions remain.
<b>Communicate Results</b>	Communicate positive and negative results to peers and get feed back. Communicate results to practitioners who may, or may not, apply your results.

Extension education addresses complex social, environmental, and economic problems where the "answers" may not exist. We cannot, therefore, approach complex problems effectively in a didactic manner. Extension education brings the expertise from communities of interest (example: scientific disciplines) to bear on problems relevant to communities of place (example: in the state where the university is located). Research, teaching, and Extension faculty bring specialized knowledge. Practitioners bring systems knowledge.

➤ *Extension educators are passionate about inquiry-based collaborative learning.*

Boyer (1990) argues that putting knowledge to work (integration and application) in service to the

community is fundamentally different from conveying knowledge and building learning capacity (teaching). Putting knowledge to work involves different methods and produces different outcomes.

- *Extension educators are passionate about addressing issues that are vital to the community and solving real world problems in collaboration with the community.*

Extension educators are interested in discovering new knowledge. Unlike university-based research faculty, Extension educators do not conduct their creative intellectual work in a theoretical environment or a laboratory. Instead, they choose to join practitioners in the field in a practical examination of the barriers to the understanding, integration and application of new knowledge. The discovery of relevant information is accelerated when communities are used as a microcosm for testing the usefulness of new ideas and technologies.

- *Extension educators are action oriented and passionate about experiential learning, learning by doing.*

## **What Are We Best At?**

Extension educators are good at identifying what we are called to do, what we are passionate about. But what are Extension educators best at? Collins (2001) and his group are careful to clarify this question. By "best at," they did not mean what do we aspire to. This second line of inquiry is not about developing goals and objectives or a strategic plan to "become" the best at something. Collins (2002) challenges organizations to ask themselves "What are we truly the very best at in the world *today*?" It is a valid and demanding question and one that challenges us to go beyond what we want to become or an assessment of our core competencies. Our core competencies as Extension educators may be in areas where we cannot be the "best" at in our local region, much less the world.

Extension educators are passionate about the impact of informal community-based educational programs. Are we the best at this? In many Oregon communities there is greater loyalty and more financial support for boys and girls clubs than for the 4-H program. After-school athletic programs are more economically efficient because they use the fewest number of adults to supervise the largest number of young people. They keep young people safe and active between 3 and 6 p.m., when their parents get off work.

The 4-H youth development program, however, has a different mission and takes a different approach to after-school programs. 4-H does more than keep youth busy and out of trouble. 4-H does more than help youth develop interpersonal, communication, and leadership skills. The goal of the 4-H youth development program is, in part, to improve the success of young people in school so they will have access and desire to engage in higher education. 4-H is the best in the world at recruiting, training, and managing adult volunteer teachers who compliment the effort of elementary and high school teachers by delivering a science-based curriculum in a variety of subjects. 4-H distinguishes itself from many other informal, community-based educational programs by engaging with the community in a scholarly way.

Are we the best at community-based, research-based teaching? The community college system has campuses in 17 of the thirty-six counties in Oregon. They offer well-developed research-based curricula and excellent teaching on just about every subject you can imagine. Many of these credit or non-credit classes are offered with distance technologies; in an informal setting, including work sites; or during evening and weekend hours. Some classes (example: English as a second language) are even offered in the home. Extension may be passionate about community-based teaching, but the community college system may be better equipped to rapidly deliver new research-based curricula to emerging and underserved communities.

Extension educators are passionate about information and technology transfer, but we may not be the best in the world at this. Research-based information has become an educational commodity on the open market. Distance learning technologies are faster and less expensive. We can argue about the rigor and the quality of information. But, once end users discover that they can control their Internet domain search (example: knowledge.edu), they do not care whether or not relevant information comes from the local Land-Grant university.

Extension, however, goes beyond informal teaching and information/technology transfer. Extension educators live and work off campus, where they gain an understanding of the worldview and decision-making context of practitioners. This allows Extension faculty to more efficiently help their clients to sort through the overwhelming flow of research-based information and discover what is truly useful. Respectful, long-term, collaborative learning relationships increase the rate at which new ideas and technologies are tested and adopted. Extension not only discovers new knowledge (research), it helps individuals and communities to put knowledge to work (integration and application). Extension not only conveys new information and technologies (teaching), it joins individuals and communities in addressing the vital social, environmental, and economic issues of our times.

- *Extension is the best organization in the world at scholarly engagement and the application of knowledge in service to society. Integration and application of knowledge is what we do. Scholarly engagement is how we get the job done.*

But, is this sufficient? How do we pay for this service?

## How Do We Connect Our Work to Its Economic Drivers?

There are several revenue sources supporting higher education in the United States. These include competitive grants and contracts, patents and licensing agreements, tuition and fees, endowments and gifts, and reoccurring federal, state, and county dollars. The Land-Grant university system connects with its economic drivers through its threefold mission of research, teaching, and service.

Research reputation and productivity connects Land-Grant universities to grant dollars, patents, licensing agreements, and endowments. Teaching reputation and productivity connect Land-Grant universities to tuition, fees, and endowments. The practical application of knowledge in service to society connects Land-Grant universities to reoccurring public dollars available for higher education. Although nearly every statewide Extension organization is diversifying its funding portfolio, most financial support for Extension education will likely continue to come from reoccurring federal, state, and county education dollars.

Connecting Extension to its economic drivers, therefore, is largely a political process. Extension does not want to appear to be lobbying for its programs; there are legal constraints. It is arguable, however, that documentation and communication of impact is different than lobbying. How do we overcome our cultural assumption in Extension education that we should not have to justify public funding for Extension to public policy decision-makers? Table 3 lists interests and concerns of today's policy decision-makers.

**Table 3.**  
Interests and Concerns of Policy Decision-Makers

<b>Makes a Difference in Constituents' Lives</b>	Recognize that very few public policy decision-makers care about research and education for their own sake. They care about research and education that makes a difference in the lives of their constituents.
<b>Real, Measurable Impacts</b>	Elected officials rarely are interested in how many people attended a program or that the participants rated sessions as positive, or even that participants hope or intend to apply new skills that they learned.
<b>Consistent Value</b>	Policy decision-makers are skeptical of individual testimonials about the value of Extension programs because these may represent exceptions rather than consistent value.
<b>Extension Is Uniquely Beneficial</b>	It is no longer sufficient to argue that Extension provides access to higher education by providing a "front door" of the university in rural communities. Technology has changed the playing field.
<b>Costs and Benefits to the Local Economy</b>	Policy decision-makers want to know what programs cost and how they benefit the local economy.

Policy decision-makers expect credible evidence of impact. This is a very high performance standard. It takes a long time and a significant amount of creative, intellectual work to document and communicate the impact of research and education on the observable behaviors of program participants. It takes years to produce measurable improvements in physical, economic, and social conditions. It is difficult to prove a direct correlation between Extension programs and changing conditions because complex problems are affected by so many variables.

To claim that an Extension program resulted in lowered child abuse or fewer high school dropouts is generally inappropriate. Extension must share credit with its many partner organizations. Our ability to generate credible impact data varies across program areas. It is especially difficult to establish the specific value of educational programs designed to prevent the likelihood that someone will need more costly intervention or remediation in the future (Debord, 2005).

Kalambokidis (2004) argues that an increasing number of policy decision-makers believe that public sector funding of the Extension service (or any government service) is only justified when the free market fails; when only imperfect information is otherwise available (example: skewed nutritional information); when a natural monopoly prevents the fair and just distribution of resources (example: all families, regardless of their income, should have adequate nutrition); when external costs of production and consumption are not accounted for in the market price (example: building on shore lines and water pollution); and when research and education programs specifically and clearly serve the public good (example: disease prevention and community revitalization). Policy decision-makers ask valid questions that Extension must be able to readily

and genuinely answer (Figure 3).

**Figure 3.**  
Why Fund Extension?

- Can Extension show that private sector entities are providing wrong or incomplete information to consumers?
- Does Extension provide information to populations that do not have any other access to the information sources?
- To what extent does Extension benefit individuals and individual businesses versus the greater public good?
- Are Extension programs available only to those who cannot purchase the goods or services on the private market? Does Extension collect a fee from those who can pay?
- Does the information provided by the Extension Master Gardener or commercial agriculture programs direct consumers or producers toward activities that have benefits to society as a whole?

McDowell (2004) argues that in order to effectively connect to its economic drivers, Extension must learn to effectively solicit political support from the people who directly benefit from its programs. Extension clientele must experience a net benefit from our educational services and attribute the benefit to Extension. The cost to our clients of acting politically for us must be less than the value they place on present and anticipated benefits from the programs we offer. We must go further, however, and ask our clientele to explain the value of our work to those who did not participate or directly benefit from our programs and explain why they should endorse its public funding.

Public value is created when a service benefits society as a whole. When a service is recognized as having significant public value, citizens who do not directly benefit from the service may endorse its public funding (Kalambokidis, 2004). By explicitly identifying the public (rather than individual) benefits for our clientele, we may stimulate in our clientele a willingness to act politically for us because they see a broader public interest in our work (McDowell, 2004).

In order to connect with its economic drivers, Extension--and the Land-Grant university system as a whole--needs to go beyond research and education. The practical application of research-based knowledge to solve complex social, economic, and environmental problems is inherently a multidisciplinary and collaborative process. Public supported scientists and teachers can and should work shoulder to shoulder with practitioners. A scholarly approach to engagement is required to generate credible evidence and leads naturally to the documentation and communication of impact.

- *Extension is the highest value higher education investment available to government and non-governmental funding agencies because Extension education programs have impact, and we can prove it with credible measures. And the positive impacts of our research and education programs are multiplied by thousands of volunteers that apply new knowledge and skills in service to their communities.*

## Remaining Questions

The process of articulating the Extension hedgehog is ongoing at Oregon State University. The conversation is pulling campus-based research and teaching faculty toward engagement with problems that are highly relevant to the state where the university is located. Many OSU research and teaching faculty greet this idea with cynicism because they are overwhelmed by the demands of their research and teaching assignments. They do not have the resources to apply knowledge directly in service to society. Campus-based research and teaching faculty may not have the training or the inclination to engage with the community.

When Extension educators are confronted with demands that they take a more scholarly approach to their engagement activities, their response is equally despairing. Most Extension educators are overwhelmed by their engagement responsibilities. However, if the third mission is to put knowledge to work in the community, then the documentation and communication of impact are not peripheral activities. These scholarly activities are central to our mission and our survival as an organization.

We have addressed the "burnout issue" of Extension educators through position descriptions that limit expectations for scholarly engagement to 15%. In other words, Extension faculty members at OSU are expected to continue to spend the majority of their time conducting informal research and education programs. They should, however, have at least one program or initiative that is carefully



designed and evaluated for impact and outcomes.

To date, campus-based research and teaching faculty at OSU have been very reluctant to take on a reciprocal commitment of 15% scholarly engagement. Many research and teaching faculty believe that scholarly engagement is Extension's job. And this is where we are stuck today. The campus/field gap occurs, in part, because tenured faculty members in academic departments do not "direct" easily. Academic reward and recognition is focused primarily on the documentation and communication of new scientific discoveries to peers within academic disciplines. The traditional campus/field gap remains a significant barrier to broadening the program portfolio for Extension, particularly when the departments that need to be involved have no Extension traditions or experience (McDowell, 2004).

Without a commitment by the university as a whole to integration and application of knowledge in service to the communities where the university is located (the third mission), the hedgehog breaks down. Extension alone does not have the human and financial resources needed to accomplish the third mission; it never did. Every truly great Extension program has been an example of scholarly engagement. It resulted from the work of a highly functional, multidisciplinary team of researchers, teachers, and Extension educators working with their clientele (practitioners) on a problem of vital significance to the local or regional community.

Funding agencies recognize this. Research proposals that have the highest probability of making an impact are collaborative and multi-disciplinary, and have a strong outreach component. The efficient integration of research, teaching, and application is the *raison d'etre* of the Land-Grant university system (McGrath, 2006). And it is our competitive edge. Imagine what we could accomplish if all faculty members employed at Land-Grant universities were accountable, at some level, to the threefold mission?

- *Extension educators are passionate about collaborative learning and putting knowledge to work in service to the community.*
- *Extension is the best organization in the world at assembling, supporting, and participating in self-managed learning teams of professionals and non-professionals that apply research-based knowledge to address the vital issues of sustainable communities of place.*
- *Extension connects its work to its economic drivers by taking a scholarly approach to engagement and by documenting and communicating the impact of its programs to public policy decision-makers.*

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