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Creating Strong Field Specialist Teams *Extension Economics Notes # 2013-1*

This *Note* describes five best practices for program leaders and/or supervisors of Extension field specialists on helping new field specialists achieve the benefits of specialization.¹

South Dakota, New Hampshire, and Ohio recently adopted the field specialist model for some of their educators. Earlier Minnesota and Iowa started similar positions but called them “regional extension educators” and “program specialists,” respectively. All of these states have adopted more specialized field staff because specialization is a key for increased productivity.²

In this paper, the term “field specialists” will be used for all specialized Extension Educator positions that are: 1) located in the field and not on campus, 2) focus their work within an area of expertise, 3) work either throughout the state or in large multi-county regions and 4) are funded primarily from state and federal funds and/or grants rather than funded partially by counties. Many of the field specialists have very similar backgrounds and responsibilities as the M.S. level state specialists of the 1980s and 1990s.

Successful Extension Program Teams

I define a successful program team as one that:

1. has sufficient personnel to provide state-wide coverage for its major programs;
2. is well known and respected by its target audience and by university colleagues;
3. can document its programs’ public value, warranting public funding; and
4. uses appropriate cost recovery methods, enhancing financial sustainability.

Five Best Practices for Successful Teams

While there are many best practices for successful teams, these five are the most practical and cost-effective ones I have seen teams use.

1. Require teams to develop a business plan within six months for their statewide programs;
2. Expect teams to do evaluations for all programs and events;
3. Develop high expectations for the scholarship of outreach teaching;
4. Sponsor a biweekly or monthly webinar course on key concepts in the area of expertise; and
5. Nudge every team to use more digital communication in working with their target audiences.

*Extension Economics Notes may not reflect the views of the University of Minnesota or its units. I appreciate the feedback from several colleagues but any errors or omissions are my responsibility. From 1974 to 2002 I was a state specialist in South Dakota, Ohio and Minnesota. From 2002 to 2007 I served as the Associate Dean and Director for the University of Minnesota Extension. **Extension Economics Notes are available at <http://ageconsearch.umn.edu/>***

Program Business Plans

The Best Practice: *Require teams to develop a business plan within six months for their statewide programs.* Program business plans cover all aspects of a program's development, delivery and evaluation. It includes the identification of the major target audience, an assessment of this audience's educational needs, a plan for curriculum and materials to be developed, a plan for program events delivery, an evaluation plan, a plan for using technology and a financial plan. See "Guidelines for Extension Program Business Planning" in *Extension Economics Notes #2011-1* (<http://ageconsearch.umn.edu/handle/129276>).

In *Notes #2011-1*, I wrote: "Cost recovery is very important for the sustainability of programs but it should be secondary to the development of high quality programs on important educational needs." While still true, I have found there is much more interest in cost recovery and many of the same steps can be taken by requiring a cost recovery plan that includes about the same information. For a two page example, see *Notes #2013-2*

Benefits: Either the program business or the cost recovery planning process helps a program team: clarify their target audience, identify who is on their program team and their roles, prepare individual plans of work, identify the program's comparative advantages relative to other programs, learn more about their costs, clarify their public value, evaluate alternatively delivery methods, and give text for use in grant applications.³ Each of these helps the field specialists focus, leading to higher quality programs and greater efficiency in delivery.

Evaluations on All Programs⁴

The Best Practice: *Expect teams to do evaluations for all major programs and events.* A strong program evaluation plan is needed for each program in order to document the behavioral changes and impacts of the activities and events in the program. I suggest the following steps by program leaders and/or supervisors:

1. Ask teams to develop a clear definition of the nature of private and public value and use evaluation tools which test the hypotheses embedded in it.⁵ The links between private value and public value helps specialists understand the importance of behavioral changes in creating public value.
2. Convince, or mandate if necessary, each program team to do program evaluations early and often.
3. Encourage program teams to use one of the quick evaluation techniques, such as ripple effect mapping (REM), initially before moving on to higher levels of evaluation because REM is quick and useful for improving programs.⁶

Benefits: As public funding pressures increase, it is essential to demonstrate how programs create private value and public value. Most teams can articulate well the value of their programs to participants, also called the private value. But many teams cannot put into words the public values of their programs, the indirect values to non-participants. Since only 26 percent of the population⁷ have ever participated in any Extension program, it is essential to document and share the public value widely to maintain public funding.

Scholarship on Outreach Teaching

The Best Practice: *Develop high expectations for the scholarship of outreach teaching.* Some of the ways to do this are:

1. Suggest field specialists use the above evaluation results for scholarship efforts as well as for building public value.
2. Legitimize sufficient time to work on scholarship for field specialists.

3. Provide training and support groups on how to do scholarship, especially the scholarship or teaching and engagement.⁸
4. Help educators participate in a national or regional (multistate) eXtension Community of Practice in their area of expertise..

Benefits: Scholarship, especially the scholarship of outreach teaching, by field specialists and state specialists serves three purposes. First, it helps the profession learn new ways to productively create and deliver programs. Second, it builds the credibility of the program team. Third, the process of evaluating programs and writing about them improves the programs over time.

Biweekly or Monthly Webinar Course for Field Specialists

The Best Practice: Sponsor a biweekly or monthly webinar course on key concepts in the area of expertise. While there are many types of professional development for field specialists, this one requires the lowest time investment of time and does the most to develop expertise and teamwork.

The biweekly or monthly webinars, or even simply conference telephone calls, can be based on reading a text book or reference book related to the area of expertise. At each session, one or two chapters are covered and several assigned questions are discussed as well as a more general question and answer discussion session. The instructor (often the area of expertise supervisor but sometimes a state specialist) makes the assignments, provides tips on which sections to focus on, and prepares the assigned questions. During the sessions, the instructor gives a very brief overview of 3 or 4 key points in the chapter, while the majority of the time focuses on discussing the homework questions. After the field specialists give their views, the instructor will provide feedback on those questions which have specific answers.

Benefits: The advantages to the instructor include:

1. This approach requires ***much less*** of an investment than preparing a typical online course.
2. There is almost no need for technology support.
3. The instructor gets to know the field staff and their strengths and weaknesses well.

Field specialists benefit in several ways, including the following:

1. They get up-to-date on tools and research within their designated area of expertise. For example, a group of new community economics field specialists did this type of course using the book *Community Economics*.⁹
2. With the participants from the same state and same area of expertise, this helps build teamwork.
3. Compared to national webinars, the smaller number of people involved results in much greater opportunities for discussion and improves learning.
4. Other state specialists can be included as experts on some chapters, building links to campus.

Target audiences also benefit as the team develops greater depth and quality to their programming.

Digital Communications with Target Audiences

The Best Practice: Nudge every team to use more digital communication in working with their target audiences. Some potential actions to encourage this include:

1. Arrange for University or Extension communication and/or eLearning specialists to do in-service training and on-going coaching on effective educational strategies with digital communications and who to integrate these with face to face delivery.¹⁰

2. Nudge teams to develop news releases by providing them with sample press releases that require only filling in the blanks with local names.¹¹
3. Recognize teams which do an excellent job on digital communications and push scholarship on it.

Benefits: With less than 10% of the population participating each year and only 26% participating at any time in Extension programming,¹² digital news releases are essential to communicate the public value of the programs to the general public. With nearly 80% of the population using the internet, moving into digital communications is not optional for Extension. Digital delivery, if well done, can be as effective as face to face, is much faster and more cost effective. It also is a means of marketing the program events to new participants and to build the reputation of both the team and Extension.

Pace Yourself - It Is a 20 Mile March

Do not expect teams to do all of these steps within the first year. It works best to have all of the teams start with either the program business plans or the cost recovery plans. Once these are completed and discussed, ask teams to do another project, while updating the earlier work. This forced “20 mile march” for all teams every year is essential to building a culture of high expectations and high program quality.¹³

These suggestions can help a program team develop a strong reputation internally, and more importantly, externally by developing great programs and sharing their impacts through strong evaluations, scholarship, and media.

Notes

¹ Economic concepts which are not successfully implemented are useless. Hence, this *EEN*.

² Morse, George W., Jeanne Markell, Philip O’Brien, Adeel Ahmed, Thomas Klein, and Larry Coyle. 2009. *The Minnesota Response: Cooperative Extension’s Money and Mission Crisis*, iUniverse, Bloomington. pp.15-44 & 96-118. Available at <http://www.apec.umn.edu/people/EmeritiFacultyDirectory/GeorgeMorse/index.htm>.

³ Morse, et. al. 2009, p.158.

⁴ “An Extension program is defined as all the educational activities aimed at the same educational objectives and the same target audience.” Morse, et. al. 2009, p. 368.

⁵ Kalambokidis, L. 2004. “Identifying the Public Value in Extension Programs.” *Journal of Extension* 42(2). See www.joe.org and her Public Value blog at <http://blog.lib.umn.edu/kalam002/publicvalue/>

⁶ Flage, Lynette and Scott Chazdon, “Ripple Effect Mapping of Extension” Webinar sponsored by the North Central Regional Center for Rural Development, Michigan State University, 2/28/12 <http://ncrcrd.msu.edu/ncrcrd/webinars>

⁷ The 26 percent might have declined since 1995 due to lower participation among younger groups or might have increased. Warner, P. D.; J. A. Christenson; D. A. Dillman; and P. Salant. 1996. “Public Perception of Extension.” *Journal of Extension* 34(4). See <http://www.joe.org/joe/1996august/a1.php>

⁸ Franz, Nancy K. 2011. “Tips for Constructing a Promotion and Tenure Dossier that Documents Engaged Scholarship Endeavors” *Journal of Higher Education Outreach and Engagement*, 15 (3) pp. 15-29

⁹ Shaffer, Ron, Steven C. Deller, and David W. Marcouiller. 2004. “Community Economics: Linking Theory and Practice, Second Edition.” Blackwell, Ames. For details on the phone course, contact me or Michael Darger, darger@umn.edu.

¹⁰ Morse, et. al. 2009, pp. 167-179. & Sagor, E. 2013. *A More Visible, Accessible Extension: Engaging Our Clientele Using Digital Communications*.

<https://umconnect.umn.edu/tywhbmq.z6i7oy/?launcher=false&fcsContent=true&pbMode=normal>

¹¹ For an example of the sample releases for one program, see Loveridge, S. and G. Morse. 1998. *Local Leadership Team Manual of Implementing Local Business Retention and Expansion Visitation Programs*, NERCRD, Pub. 72.

<http://nercrd.psu.edu/publications/BR&E/br&e2.html>

¹² Warner, et.al.1996 & Loibl, C., F. Deskman, and M. T. Batte. 2010 “Does the General Public Know the Extension Service? A Survey of Ohio Residents” *Journal of Extension*. 48(2)

¹³ For a more detailed discussion of the benefits of this type of “20 mile march,” see Chapter 3 in Collins, Jim and Morten T. Hansen. 2011. *Great by Choice: Uncertainty, Chaos, and Luck-Why Some Thrive Despite them All*. HarperCollins, New York.

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