

needs and priorities: the specialist's role

Harry B. Burcalow
Harlan G. Copeland
Susanne G. Fisher

Extension specialists don't escape the stress and tension associated with increased program requests, limited financial resources, and complex problems that need to be addressed.

Similar to other Extension personnel, specialists hear competing messages about program needs and priorities from local, county, state, and national sources. These messages mean specialists must decide how, where, and with whom to share their expertise.

As part of continuing in-service education for Extension specialists, we were asked to design and teach a course dealing with special problems faced by specialists in assessing needs and determining program priorities.

Assumptions About Roles

We began by agreeing that Extension specialists perform unique and important roles in the land-grant university system. Specialists relate the research results of the university to the educational needs of people. They also identify problems that can lead to further research. Additionally, specialists provide Extension colleagues and clientele groups up-to-date information on trends, standards, and issues in their fields of expertise.

Specialist roles in working directly with clientele vary from state to state. Minnesota Extension specialists live in the state's major metropolitan area and nearly one-half of the state's population is within a 50-mile radius of the campus. Thus, clientele often contact specialists directly or through campus-based phone answering services. Specialists may also work directly with representatives of state agencies, community organizations, or professional groups due to proximity.

Harry B. Burcalow: Associate Professor and Assistant District Extension Director, Agricultural Extension Service, University of Minnesota—St. Paul, *Harlan G. Copeland:* Associate Professor, Adult Education, College of Education, University of Minnesota—St. Paul, and *Susanne G. Fisher:* Professor, Assistant Dean and Department Chairperson, 4-H and Other Youth Programs, University of Florida—Gainesville. Accepted for publication: May, 1981.

Current Practices

As part of the course design process, we conducted intensive 2-hour interviews with 10 pre-enrolled specialists. They varied in Extension experience from 1 to 20 years. Seven specialists held appointments in academic departments. Here are the conclusions from the interviews.

Roles Are Unclear

Extension specialists tended to be confused about their roles and responsibilities in needs assessment and priority setting. Several reported competing expectations from academic department administrators and colleagues, Extension administrators, and county Extension agents. Others indicated that they often felt locked into previous program efforts, and thus were unable to make changes in program priorities.

Data Sources Used

While the number of data sources for program objectives reported by specialists ranged from 1 to 12, the average was 7. County Extension agents were identified as the *primary data source* in six cases and three specialists named other specialists or program participants.

Data sources *most frequently mentioned* by all specialists were clientele with whom the specialist had personal contact and evaluation reports from previous programs. Professional associations and literature, research results, political forces, and specific surveys and studies were reported less frequently.

Similar to other Extension personnel, specialists hear competing messages about program needs and priorities from local, county, state, and national sources. These messages mean specialists must decide how, where, and with whom to share their expertise.

Program Needs Not Clear

In all cases, the specialists indicated that they desired additional data on which to base program decisions. The majority of the specialists preferred personal contact with local clientele groups feeling that more data from this source would be valid.

Setting Priorities

Although all specialists indicated that they set priorities for programs for which they personally provided leadership, the criteria used to determine these priorities weren't clear. Personal criteria included responding to the "squeaky wheel," "working with colleagues to divide up the work," "following tradition," "responding to professional interests," "working where results could be obtained," and "doing what I think is most important."

Nine of the 10 specialists agreed that setting priorities for Extension programs was a problem in their departments. "Amount of time available" and "trying to do everything for everybody" appeared to be the major departmental criteria.

***Knowing When
and How
To Say No***

Specialists were candid about their struggle to take on realistic program assignments. Several indicated that they were caught in the "activity" trap and really didn't have (or take) time to plan carefully. Others indicated that when they tried to make decisions about program priorities, they didn't feel that administrators were consistently supportive.

They indicated, however, that they rarely left a request unanswered. If they couldn't respond directly, they tried to identify other sources from which agents or clientele groups could get help.

**Staff
Development
Activity**

From the interview findings, we developed the following objectives for Extension specialists participating in the six-hour course:

1. To understand the complexity of the Extension specialist's position, including roles and relationships useful in understanding needs assessment.
2. To clarify basic concepts—audiences, needs, interests, standards, and program priorities.
3. To identify sources of program objectives and alternative data collection techniques.
4. To identify techniques for developing clientele interests in "needed" programs.
5. To identify techniques useful in setting personal priorities and knowing when to say NO.

**Course
Content**

We felt the learning environment was critical. So, participants introduced themselves by sharing their easiest and most difficult experiences in determining a program need. These examples were used to reinforce major concepts throughout the course.

The agenda was shared, and we asked if the content met their expectations for the course. As a result, it became evident that no two specialists viewed their roles, responsibilities, or clientele in the same way. Participants recognized that many factors were involved in addressing the two issues of needs assessment and priority determination for specialists.

The course included the following topics:

- *The Role of the Extension Specialist.* The specialist's generic job description was examined in the context

- of Extension philosophy relating to mission, program development, and administrative functions.¹
- *The Concept of Needs Assessment.* Tyler's² sources of data for program objectives and his differences among the concepts of educational needs, psychological needs, and interests were reviewed.
 - *Clientele.* Through discussion, we identified criteria for determining relevant clientele, and examined special characteristics of participants.
 - *Data Collection Techniques Including Clientele Involvement.* A list of potential techniques was compared with those specialists had used. We discussed the role of clientele with the needs assessment task, various degrees of involvement, and the advantages and disadvantages of their involvement. Specialists reported their experiences with various data collection techniques, including use of advisory groups.
 - *Process of Setting Priorities.* "First Things First—Part II: A Trip to Priority Peak" (a slide/tape) outlined a six-step priority-setting process.³ Small groups discussed:
 1. What successful *techniques* have been used to set priorities?
 2. What *criteria* have been used to set priorities?
 3. What are the *individual* and *organizational factors* that interfere with priority setting?
 - *"No Saying"—How To Do It?* We focused on criteria used to determine when the response should be NO, why we don't say NO, and how to say NO.
 - *Converting Needs to Interests.* We planned to explore how to develop clientele interest when a *need* had been determined. However, time didn't permit including this topic.

What Did We Learn?

Both participant and instructor evaluations were used to determine the value of the program. From the 20 specialists, 2 state administrators, and 1 area agent, we found:

1. The group ranged in years of employment from 4 who had been employed 0-2 years to 3 who reported employment of 16 or more years.
2. Seventy-four percent of those attending did so because they felt they could "gain new information." Ninety-one percent attended because they felt the course "should be personally valuable." No participant attended because the course was "recommended by supervisor."

3. The course was given the following average ratings on a 5-point scale with 1 being "not at all" and 5 being "to a great extent":
 - "Can apply principles to new situations"—3.8
 - "Have become more interested in subject"—3.7
 - "More proficient at relevant skills"—3.4
4. Given the opportunity to select either "yes" or "no,"
 - 90.5% indicated the "course should be repeated for others."
 - 72.2% indicated that an "advanced course should be developed."

Based on these data and faculty observations, we concluded that:

1. The specialists' understanding and skills related to needs assessment and priority setting didn't emerge as the major issue. Instead, the specialists' perception of barriers (mostly organizational) appeared to be the major problem that prevented effective needs assessment and priority setting. For example, specialists felt there was *too much ambiguity between what they perceived their roles to be* and what's expected of them. There was uncertainty about whether it would be acceptable to decline an invitation to serve the public.
2. Specialists weren't aware that the variety of data sources they consulted or that the data collection techniques they used for program objectives were forms of needs assessment. (Perhaps this is due to a perception that needs assessment is best done through clientele surveys.)
3. Since supervisors provide performance feedback, they also needed to understand the issues being addressed. Supervisors could be invited to participate with the specialists or participate in a separate program.
4. The interview technique proved to be of value in determining the problems and frustrations of specialists, and in stimulating interest in attending the in-service education program.

Next Time?

We're convinced that in-service education in the area of needs assessment and priority setting is needed, appropriate, and would be attended by specialists. The focus of a future course, however, would be changed to reflect the importance of organizational and individual barriers in implementing these two processes. Both specialists and supervisors would be invited to participate.

A workshop format is proposed for a future course. Small groups would be asked to: (1) identify organizational and individual barriers experienced by specialists in the needs assessment and priority-setting processes and (2) determine which group of barriers presented the most problems.

For perceived *organizational barriers*, we would ask small groups to select and analyze one or more organizational barriers and to propose ways of removing or modifying the barrier(s) they'd experienced. These change strategies could be shared, discussed, and evaluated by the total group.

Individual barriers (probably due to inadequate knowledge, skills, or attitudes) would be examined through use of handouts, visual aids, and other resources prepared by instructors. Discussion groups would also be effective ways of helping specialists and supervisors consider new concepts and approaches in needs assessment.

We observed that specialists were committed to providing educational programs that attend to both educational needs (often unacknowledged) and interests (wants) of the clientele they serve. Specialists, however, expressed frustration when a "needed" program was delivered to an "uninterested" audience.

Thus, it's our opinion that specialists would want to discuss whether Extension programs should be based on interests and/or needs. Additionally, the future course would include ways to stimulate interest of participants in educational programs that specialists and others have decided are necessary and "needed."

A future course might include a plan for providing supervisory performance feedback to specialists. While specialists would receive useful help regarding individual barriers, both supervisors and specialists would be able to deal constructively and creatively with the resolution of perceived organizational barriers.

Footnotes

1. *Minnesota Extension Program Development Process, Part 2: Frame of Reference* (St Paul: Agricultural Extension Service, March, 1976) and *Minnesota Extension Program Development Process, Part 3: Strategies and Procedures* (St. Paul: Agricultural Extension Service, October, 1978), pp. 5-6, 20-22.
2. Ralph W. Tyler, *Basic Principles of Curriculum and Instruction* (Chicago: The University of Chicago Press, 1950).
3. Laverne Forest and Sheila Mulcahy, *First Things First—Part II: A Trip to Priority Peak* (Madison: University of Wisconsin-Extension, Division of Program and Staff Development, 1976).