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# **Staff Paper Series**

**BUILDING PARTNERSHIPS BETWEEN EXTENSION**

**ECONOMISTS AND AGENTS:**

**LESSONS FROM THE BUSH FELLOWSHIP**

**PROGRAM IN COMMUNITY ECONOMICS**

**by**

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**Building Partnerships Between Extension Economists and Agents:  
Lessons from the Bush Fellowship Program in Community Economics<sup>1</sup>**

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**Building Partnerships Between Extension Economists and Agents:  
Lessons from the Bush Fellowship Program in Community Economics**

**Abstract**

**An experimental training program for extension agents brought agents and specialists into daily contact for eighteen months, enabling them to share information about their respective work environments. The lessons learned can increase mutual understanding between agents and specialists. Such understanding is necessary to develop effective partnerships to create useful programming.**

## Building Partnerships Between Extension Economists and Agents: Lessons from the Bush Fellowship Program in Community Economics

### Introduction

In the late 1980s, the Minnesota Extension Service decided that its Community Resources<sup>2</sup> program area needed more support. Field staff numbers and training were far below the levels required to develop and maintain a high profile Community Resources program throughout the State. The program area boasted 124 county agents, but all of these agents had partial appointments accounting for only 5 to 30 percent of their time. In total, these 124 agents amounted to less than 13 FTEs for the program area<sup>3</sup>. In addition, and perhaps more importantly, none of the 124 county agents had formal training in the area of community economics--instead they had been assigned to Community Resources responsibilities after having been hired for expertise in Agriculture, Youth Development, or Home Economics & Family Living. Community Resources agents had strengths in group process skills, adult educational processes, knowledge of their communities, and enthusiasm, but needed to enhance their knowledge of community economics subject matter.

Hiring new full time county agents trained in community economics was not a feasible option for alleviating the lack of trained county staff in a time of intense fiscal pressure. A reallocation of existing resources was required. The challenge was to determine how this could be accomplished. A simple change in agents' percentage appointment would not be adequate, since this would give them more time to work in the area, but would not provide them with sufficient content background to be effective. Retraining existing agents was essential to the new thrust in Community Resources. It was proposed that a small group of existing agents come to campus for an extended period of intensive retraining. Participating agents would take courses related to community economics and interact with a broad range of campus-based state specialists. A Bush Foundation grant paid temporary county replacements for agents coming to campus for training, and the Bush Fellowship in Community Economics was born<sup>4</sup>.

As initially designed, the Bush Fellowship in Community Economics was an eighteen month program of coursework, research, and fieldwork. The fellowships were based in the Department of Agricultural and Applied Economics at the University of Minnesota, with an additional three months of research and three months of fieldwork to be carried out in agents' own counties. Agents were to work closely with, and be advised by, a team of three state specialists based in the Department of Agricultural and Applied Economics. The Bush Fellowship Program had four objectives:

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<sup>2</sup> The program area name was changed from Community Economic Development to Community Resources in 1991. For the sake of clarity, the program area is referred to as Community Resources throughout the document.

<sup>3</sup> The Community Resources program area also had four full time area agents, but an administrative decision some years earlier had frozen these positions: the incumbents could remain in their positions, but they would not be replaced. The administration felt that the lack of geographic focus in area agent positions made them less useful than county or cluster positions.

<sup>4</sup> The grant also provided temporary support for two campus-based specialists.

- 1) increase the capacity of the Minnesota Extension Service to conduct educational programming in community economic development;
- 2) develop educational materials for community economic development;
- 3) provide intensive training to increase the expertise of extension agents; and
- 4) improve educational programming relationships between field staff and specialists.

This paper reports on the initial outcomes of the program, focusing lessons learned about the last two objectives, training agents on economics and closer campus and field staff relationships, because more time is needed to evaluate the outcomes on the first two objectives. As the title of the paper implies, the closer relationships between these two groups led to considerable learning by the campus faculty. The remainder of the paper is divided into four parts. First, we review the types of training programs developed for the county-based agents. In sections two and three, we examine specialists' insights into agents' world and vice versa. Finally, we recommend ways to make a successful program even better.

### Training for Agents

Agents were expected to take eight academic courses as part of the Bush Fellowship, though in practice, they usually took three to five courses per quarter. Recommended coursework included macro- and micro-economic theory, economic development, public finance, human capital, trade & development, regional economics, land use, and marketing & prices. These recommendations were intended to give agents some economics basics, as well as exposure to faculty from the Department of Agricultural & Applied Economics and the Humphrey Institute of Public Affairs.

Two agents began their fellowship during the 1989-90 academic year; two others began during the fall of 1990. Two of the agents had most of their experience in the area of home economics, one in youth development, and one in agriculture. It soon became apparent that the original Bush Fellowship model needed to be reconsidered--agents had concerns about the applicability of their coursework to problems they encounter in their communities. This perceived lack of applicability was the result of two factors. First, the courses are quite theoretical in nature; specific examples of applications relevant to agents' needs are typically not included in the lectures or readings. Second, most of the Bush Fellows did not have the course prerequisites in math and economics, which meant they needed to work harder than their classmates, leaving them little time to use the material to reflect on or develop useful programming in community economics in preparation for their return to their counties. Fortunately, the agents were very open in communicating their concerns to their advisors. In response, three state specialists began a tutorial program designed to help agents bridge the gap between the theory they were learning in their courses, and potential extension programming in community economics<sup>5</sup>. These tutorials eventually came to be called "bridge courses." The bridge courses evolved into courses taken for credit around specific themes: Community Economics in Extension, Data Sources in Community Economics, and Business Retention and Expansion Strategies.

Concurrent with the development of the bridge courses, specialists and Bush Fellows began collaborating on a monthly newsletter for field staff. Specialists and Bush Fellows collaborated to identify newsletter topics. Each newsletter typically featured one economics topic written by a specialist, an example of successful field staff programming activity written by a Bush Fellow, and a state specialist biography written by a Bush Fellow or a specialist. One Bush Fellow took responsibility for development and editing the newsletter. She also helped develop educational

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<sup>5</sup> In contrast to the academic courses offered on campus, which are strong on theory and research, traditional extension in-service training programs focus on specific extension programming.

materials relating to retailing and taxes as additional special projects. Projects by the other Bush Fellows include: evaluating youth entrepreneurship education programs, supporting the Business Retention and Expansion Strategies program, developing criteria for successful community economics programs, and examining the effects of tax increment financing on local government finance.

The bridge courses, special projects, and the newsletter ultimately proved to be the enriching aspects of the fellowship program, not only in terms of output and learning, but also in terms of fostering communication between agents and specialists. With the almost daily contact between the specialists and Bush Fellows that the bridge courses, special projects, and newsletter brought, everyone associated with the program became more willing and able to share information about barriers to working in community economics and their daily work situations. An analogy to this experience would be the cross-cultural understanding that comes from an extended international visit or hosting a foreigner in one's home for several months to a year. As a result of this increased understanding, each group is more able to work effectively with the other group.

The following sections highlight the cultural differences that specialists and agents discovered about each other, and indicate how this knowledge will make each group more effective. This information is general enough to be useful in increasing mutual understanding between agents and specialists in other disciplines and states. It should be noted that the agents had 7 to 14 years' experience in the Extension Service, while the specialists had served zero to 15 years with extension. All seven of the agents and specialists, regardless of their number of years in service, report gaining insights from this cross-cultural exchange beyond what can be attained through experience alone.

#### Specialists' Insights into Agents' World

Specialists gained insight into the energy agents must put into administrative politics, which not only assures continued funding for their own positions, but is also key for rallying support in lobbying efforts for extension in the State Legislature. Agents are not tenured, and have many "bosses" with conflicting goals. These include: the county extension committee, county commissioners, extension district directors, program leaders, and their peers. Service demanders can influence how an agent is evaluated, so agents must respond to a wide variety of needs, while specialists typically receive calls only in their area of expertise. Currently 4-H, home economics, and agricultural groups see their support from extension as threatened, so they often lobby to make it difficult for agents responding to requests for assistance in the areas of natural resources or community development [See McDowell (1991) for a discussion of this problem]. During budget retrenchments, field staff are very vulnerable--and tenured faculty sometimes forget the level of stress this puts on agents.

Specialists also learned that it is easy to overestimate agents' freedom to act as advocates in their communities. As an example, the Community Reinvestment Act currently contains provisions which, under certain circumstances, allow communities to challenge banks with respect to their lending policies. To suggest that agents play a role in challenging their local banks, however, is tantamount to suggesting they commit political suicide, since bankers in small communities are usually quite influential in matters related to community finances, including local extension budgets. A much more sensitive recommendation on this topic would be to suggest agents quietly look for ways of helping banks with low Community Reinvestment Act performance evaluations to improve their records, thereby avoiding confrontations.

Specialists learned the extent to which bringing an outsider into the community is a risk to the agent. A specialist gets into the car and returns home, but the agent has to live with the consequences of whatever the specialist does or says for months or years. Unjustifiably, the agent is held accountable for the effectiveness or the message of the specialist. To local audiences, agents and specialists are both seen as the university and extension, and if the product is not good, there is

a loss of credibility for the agent, and in the extreme, local funding cuts can result.

As a result of the political minefield in which they operate, agents must be very responsive to clientele requests. Given that agents hold appointments in up to four program areas, a disparate array of requests leaves them with little chance to focus on a particular set of issues for very long. It is difficult for most agents to acquire new computer skills or do an in-depth study of problems while on the "firing line" in their counties, though some agents with political savvy and strong educational programming skills have had success in in-depth interdisciplinary issues. Specialists need to be realistic about what agents can accomplish under these circumstances, and tailor their programming efforts so that agents can learn and adapt materials to their clients relatively quickly and easily. Increasingly, agents are being encouraged to teach materials themselves rather than serving in the facilitator role. Specialists who avoid jargon, and who provide agents with training, teacher guides, and "camera-ready" visuals are seen as specialists that empower agents.

Specialists, who frequently have no formal training in adult education techniques, learned the importance of actively engaging adults in the learning process by helping adult learners ask and answer their own questions rather than relying on lectures as a medium of communication--moving from the expert model to a co-learner model is critical in adult education. They found incorporating these educational techniques considerably enhanced the effectiveness of their programming. Specialists also learned the importance of creating an environment for effective learning with attention to details such as proper introductions and name tags.

The specialists also learned the importance of applying group process techniques to build team relationships. Specialists found that in county offices, agents must work closely as a team to be effective, and were surprised by the number and length of group meetings the Bush Fellows anticipated as part of the project. Ultimately, these meetings served as the foundation of successful programs, but they required a paradigm shift from the specialists, who were more used to working individually or in very small groups.

While the specialists knew that successful programs are needs-based and issue oriented, they found that agents frequently view cross disciplinary programs as a prerequisite to effectively addressing an issue. Specialists discovered they need to be more flexible in the types of programming they are willing to undertake, and the format or context in which their material is presented.

Specialists also learned that many agents' work loads have seasonal highs and lows, and that new programs that are in tune with seasonal lows are more likely to gain agent acceptance than programs that require heavy time investments by agents during peak season. For example, summer is not the best time offer new programming activities to agents with heavy commitments in youth development and agriculture.

Another lesson with respect to agents' time is that agents prefer programs offering them a well-defined role, as well as some indication of the amount of time they will need to schedule for the program, and number of days, weeks, or months the program will last. (Specialists must approach the estimates with care, stressing that time to complete a program varies between people and communities. Agents tend to be overbooked, so they should be aware that the actual time commitment might be different than the estimate.) Agents are enthusiastic about learning new materials if they are convinced the specialist will provide them with quality support.

Finally, specialists discovered that all campus-based faculty need to put more effort into explaining the nature of their work to agents, and listening to issues of interest to agents. As a result of poor communication, agents had some misconceptions resulting in disappointment and frustration with some specialists.



### Agents' Insights into Specialists' World

Agents were surprised to learn that specialists held split research and extension appointments, that the percentage of these appointments varied among individuals, and that an individual's percentage appointment is very influential in how the specialist allocates time. Most had assumed that specialists' only assignment was to provide support for county programming, and were unaware that some specialists only worked with groups at the state level, with little county-level contact. Agents assumed that specialists answered only to extension administrators, and underestimated the influence of department heads and the peer review process on specialist activities. Given the assumption that specialists exist to work only with agents, it is not surprising that agents felt that many specialists were not effective in their jobs! Once agents realized the research, teaching, service, and non-agent outreach obligations specialists face, they became much more realistic in their expectations of specialist support.

Agents also gained new insights about the pressure to publish that most new specialists face as part of the tenure process. The importance of tenure to the specialist's career, and how the need to get tenure can affect specialists' time allocations were insights agents gained as part of their campus experience. They learned that the order of authorship is viewed as an indicator of the relative level of effort by each of the authors. They were also surprised by the importance that specialists' culture places on proper attribution of sources. Agents came to appreciate the importance of departments within the campus-based system in terms of how departments affect resources available to specialists. Also, agents had assumed that program leaders had substantial power to direct the nature of specialists' efforts, whereas in reality, academic reward systems favor disciplinary contributions, which skews specialists' incentives toward areas most likely to be appreciated within their own departments.

Agents were also surprised to find departments failing to apply the principle of comparative advantage in that specialists answer their own phones, and do much of their own word processing and filing due to shortages of support staff. Agents also discovered that non-standardization of specialists' equipment and software within the University system creates barriers to sharing of knowledge and joint projects.

Through the writing and editing projects associated with the newsletter activities, agents learned that creating quality educational materials from a research base is a process of multiple rewrites of drafts. Agents had underestimated the time and effort required to produce such materials.

As one of their projects for the "Data Sources in Community Economics" bridge course, agents developed a set of overheads of economic data for their own county. Through this exercise, agents gained not only an understanding of economic trends in their counties, but also an appreciation of the effort required to produce such a set of useful overheads in a readable, attractive format. They also learned to appreciate that the presentation of economic data can be both complex and subtle.

Through their association with a research project while on campus, agents gained a better perspective of the scope and complexity of economic research, and the amount of time required to produce quality research. Agents learned that they could not reasonably expect an impact analysis or a feasibility study on short notice. Further, they realized that individuals producing such studies on short notice are unlikely to have done a complete analysis.

Agents realized that specialists appreciate research suggestions from agents, and that with proper lead time, agents can influence faculty research agendas<sup>6</sup>. At the same time, agents became aware that specialists' research ideas come from a variety of sources other than agents' expressed needs (Likewise, successful agents use specialists as one of many sources of programming ideas. See for example, Casey and Krueger). Agents also gained a greater understanding of the time and dollar requirements associated with carrying out publishable research. Agents learned to appreciate how a long-term focus on a particular question or set of issues enables specialists to develop the research base and perspective necessary for high quality extension programs.

Agents also recognized that specialists cannot be as service-oriented as agents. Specialists are not encouraged to drop everything in response to a request outside their area of specialization. In fact, as extension appointments are becoming more research-oriented in nature (see for example, Doering; Goldman), incentives increasingly run in the other direction. In contrast, county staff must be responsive because service demanders have close contacts with local funding sources. As brokers of information, agents simply can't pass calls to another person in the county, but must show some evidence of follow-up on finding a source of information. Agents found that specialists could not achieve the benefits of specialization if they followed the same service-oriented approach on all topics.

### Recommendations for Replicators

All the agents and specialists participating in the study-leave program felt it was successful<sup>7</sup>. Agents increased their knowledge of community economics, specialists learned how to be better educators, and agents and specialists began to understand each other's strengths and needs. Nonetheless, some lessons were learned that could help those attempting similar programs in the future. These are:

1. Review Agents' Academic Background. Agents applying to the program should be asked to provide their academic transcripts to the specialists responsible for program execution. This allows targeting of coursework appropriate to the individual. Scheduling a few months between the application deadline and the program start date would also allow agents time to get training in prerequisites.

2. Local Extension Committee Approval of Reorienting Agents' Position. Not all local extension committees or co-workers fully understood the implication of the Bush Fellowship on the agents' work activities after program completion. A candid discussion and clarification of which of the agent's responsibilities would be eliminated to accommodate increased effort in community economics with all staff affected by the change should be completed prior to the agent's application to the program.

3. Importance of Campus Resources for Agents. To achieve success, the program must provide agents with high levels of access to specialists. In the Bush Fellowship program, each specialist worked with one or two Bush Fellows as their advisor and first point of contact for tutorial assistance. In addition, all specialists worked with agents on bridge courses, the newsletter, and

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<sup>6</sup> In many instances, faculty are excited by the research issues raised by an agents, but the agent's problem may have been resolved by the time the specialist completes all the steps of a typical research project. (i.e. develop a problem statement, raise money, hire a research assistant, assemble the data, and interpret results.)

<sup>7</sup> The campus faculty were sufficiently pleased with the results that they hope to conduct a similar program every 3 to 4 years. The length might be shortened to 9 months on campus with another 3 months of transition time in the field.

special projects. Without access to specialists, agents participating in the program would simply have been taking courses, and the major benefits of the program would have been lost.

**4. Support Team** A support team of 4 to 6 community leaders should be established by the agent prior to starting the program. While in the program, agents would periodically transmit some of the concepts and practices being learned to the support team. The purposes of this on-going contact are: 1) to build a team that holds the same vision as the agent; and 2) to give the agent practice in translating the new concepts into locally relevant topics. Without this team, county expectations about the agents' role may be unrealistic.

**5. Bridge Courses** Regular academic courses provide the agents with a strong theoretical and research background. Unfortunately, they are mute on how to translate these concepts into effective Extension programs. Campus faculty should plan to teach at least one "Extension Bridge Course" each term. These courses work best when developed around a specific extension program deliverable, tying in the specific theory and research related to this topic. Depending on the format, off-campus agents and community leaders can also participate in these classes.

**6. Critical Mass for Program:** Several aspects of the program would not have worked if only one agent was on campus at a time. Bush Fellows also gained knowledge and support from each other as a result of their mutual experience. Setting the minimum level of participation for a productive program is subjective, but the authors recommend at least four agents participate concurrently.

**7. Maximize Impact of Training:** Preference should be given to applicants who, upon their return to their counties, will cover multiple counties and spend the highest percentage of time working on Community Economic Development issues. Without this, a major investment is put into agents who can only spend a small fraction of their time using their new skills. This can prove frustrating to both the agent and the campus specialists.

**8. Extension Projects Rather than Research Projects** Each agent should have 1 or 2 projects outside the courses. While the original hope was that these projects would be applied research projects to help the agents develop their analytical skills as well as to broaden the research available for extension purposes, this was not highly successful. In retrospect, this outcome is not surprising given the background and interests of the agents. When the projects focused on adapting research to extension programs, the agents were very creative and productive. This also met an important need for agents: having deliverables visible to key decision-makers upon completion of their program.

**9. Development of Program Deliverables by Campus Faculty:** It is unrealistic to expect county agents with this training to independently develop high quality extension programs without considerable state specialist assistance. Anyone would be hard-pressed to develop outstanding program "deliverables" in eighteen months while taking eight regular academic courses. Rather, the expectations should be that agents with this additional training will learn the economic aspects of new projects more quickly. Campus faculty must take responsibility for developing "deliverables" for use by extension agents. Without these deliverables, the agents feel uncomfortable as they start to re-enter their counties and try to explain their projected new activities to extension administrators and county commissioners<sup>8</sup>.

**10. Administrative Support** Several agents made it clear that they were interested in Community Economics, but they did not apply to the fellowship program because they were

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<sup>8</sup> While Bruce Weber's roles for extension in economic development (building perspective, knowledge, skills, and institutions) are important ones, they are difficult to explain to community leaders. Many community leaders are skeptical whether extension can be effective in economic development. The roles that Weber outlines can best be played within the context of tangible deliverables.

uncertain about the program area (Community Resources). Within the county, agents feared alienating traditional clientele. Within the organization, the small size of staff in the program relative to other program areas suggested to agents that the program area was not a high priority for the administration. Thus agents feared that focusing on Community Resources would increase their chances of being laid off, while decreasing their opportunities for promotion.

11. Build Computer Training into Program. Agents lacking computer skills were handicapped both in their coursework and in preparing materials for use in their counties. A two week intensive course in word processing, graphics package, and spread sheet use prior to beginning regular coursework would have been helpful.

12. Reimbursement of Relocation Costs. Three of the four agents participating in the program lived within commuting distance of the campus, while many agents who did not apply stated that their main deterrent was that they could not leave their families behind for 9 to 12 months, or move them to the campus area. In retrospect, it would have been more equitable to partially reimburse agents' relocation and transportation costs, rather than provide 10% salary increases to all participants.

### Implications for Programming

Extension needs to move away from the model of a specialist parachuting into counties to offer quick solutions and towards a model of agents and specialists working side-by-side to develop a real understanding of local problems. Specialists should empower agents with easy to learn, teach, and adapt lesson plans. Programs should be designed that agents can teach to local audiences. Specialists should provide support for the agent when questions and problems arise.

At the same time, to the extent possible, specialists should focus on developing "deliverables" as opposed to information. Following the criteria developed by George McDowell (1985), a "deliverable" has specific characteristics. First, the information should be made relevant for learners by using local data wherever possible. Second, learners should be able to benefit from what they have been taught, and thus be willing and able to help extension when it needs support.

A "deliverable" is quite different than simple information distribution through pamphlets and articles. Examples of deliverables in the field of community economics are Business Retention and Expansion Programs<sup>9</sup> involving a state specialist supported local data collection and strategic planning effort, a "Local Data Package" providing communities with a publication<sup>10</sup> that assembles public domain data from a variety of sources into an attractive, readable format that helps communities assess local trends, and a "Pull Factors" teaching outline that helps communities evaluate the performance of their retail sector. According to Holt, "The enduring problem of managing change in extension will be to increase the availability and quality of 'shelf products' that people are demanding while finding the support and the will to continue to develop products that are not yet being demanded, but which we know are needed." Improved communications between agents and specialists is a prerequisite to solving that problem.

The Community Resources program area of the Minnesota Extension Service is using the information gained through its experience with the Bush Fellowship program to design better training packages for agents. A new effort, "The Community Resources Consultant Certification Program," is currently underway. This program combines the bridge course concept with teleconferencing to allow a wider range of agents and their community partners to participate in the training. Four bridge courses will be offered over a year. The teleconference aspects of the bridge

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<sup>9</sup> See Morse, George W. (ed.) for a description of this program.

<sup>10</sup> See Johnson and Parliament for an example.

courses are supported with six two to three day conferences involving agents and their collaborators. The conferences allow presentation of materials not well suited to the teleconference format. Perhaps more importantly, the conferences provide agents and specialists with an opportunity to interact face to face, which will help foster the high level of communication that was so critical to the success of the Bush Fellowship program.

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