Views on Sea Grant Advisory Service Work

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Establishing and, for the past nine years, directing an advisory service program have provided me with certain experiences and understandings that may be useful to other Advisory Service workers. This booklet was developed because of a repeated need to share such understandings with Advisory Service staff in New York and with program leaders and staff in a number of other states as well.

Although the sections were written primarily for Advisory Service program leaders and staff, they may also be helpful to others interested in the operational details of certain aspects of Advisory Service work.

The materials, which I developed while on sabbatic leave as Visiting Sea Grant Professor at Oregon State University and while at the University of Southern California, have benefited greatly from insights, reviews, and comments by staff in New York, Oregon, California, and many other states.

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May 1980

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Published by New York Sea Grant Extension Program, the State University of New York, and Cornell University, in cooperation with the U.S. Department of Commerce and the U.S. Department of Agriculture.

I Program Leadership of Advisory Services

Leadership of an Advisory Service program is not only complex and important, but it also can be satisfying. It usually entails both planning for and managing staff and program while ensuring fiscal and program accountability.

Program support is necessary in secretarial, personnel, communication, and fiscal areas.

The leader is responsible for ensuring such support is available and functions smoothly, but his or her involvement with the mechanics of these functions should be minimal.

Rather, the majority of the leader's time should be devoted to program staffing, planning, performance, evaluation, and reporting.

These seem to be best carried out through:

- Staff recruitment;
- Staff training;
- Program planning;
- Program execution;
- Program evaluation;
- Personnel evaluation;
- Creating rapport with other groups and individuals;
- Internal communication of results, including negative as well as positive achievements.

To implement most of these, staff are hired to execute the program.

Professional Staff Recruitment

This is of key importance. A poor staff produces a poor program. A good staff is essential in generating a good program. Most program leaders can identify more important tasks than can be undertaken with available resources. Thus, before staff are hired, two questions should be answered—"With what audience will they work?" and "What disciplinary background will they need?" Once these answers are known, recruitment can begin.

Staff characteristics

Academic training in the discipline is needed, and ability as an Advisory Service educator is essential. No effective predictors of these abilities are available, but certain personal characteristics appear frequently in potentially successful, but inexperienced, Advisory Service workers:

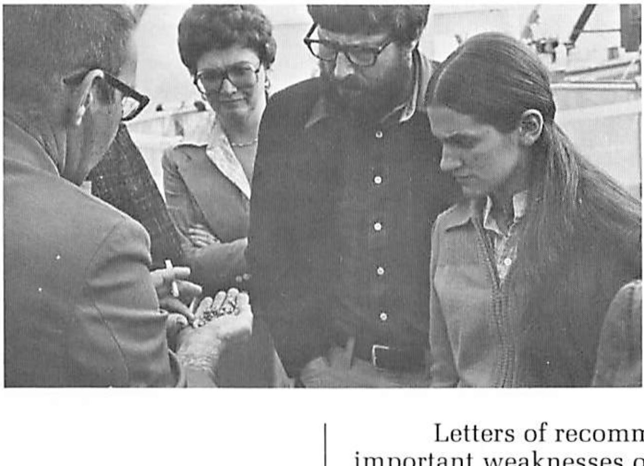
- They listen well, absorbing not only what the other person is actually saying, but also sensing other unspoken clues;

- They are concerned about people and interested in helping them solve problems. They empathize without losing perspective;
- They are organized and goal oriented, but also recognize the need for flexibility;
- They are critical thinkers, able to both give and receive suggestions in a non-threatening manner;
- They are personally vigorous with energy and commitment;
- They are neither shy nor overbearing;
- They write clearly and concisely.

It is desirable, but not initially essential, that they have knowledge and skills in:

- Communication techniques including public speaking, writing, and visual aids;
- Adult education theory and practice;
- Their audience's work and problems;
- The physical and social dimensions of the locale in which they will be located.

Where do we get such paragons? Because disciplinary orientation is important, the primary sources are academic programs and marine-related agencies and firms.



A low grade point average can indicate those without promise; however, high averages do not necessarily ensure competency.

Courses taken, employment experience, and volunteer activities can suggest areas of an individual's commitment.

Writing samples of Advisory Service type material can be helpful indicators.

Letters of recommendation can identify important weaknesses or emphasize strengths.

A personal interview is imperative.

Altogether, these are useful, but not totally reliable, predictors of effectiveness in Advisory Service work.

Staff Training

Effective training will enable the Advisory Service staff to do a better job and will give them greater job satisfaction. Too, deficiencies in their training and background will need to be corrected.

Training includes several components. Some of the more important are:

- New agent or specialist training;
- On-the-job training;
- In-depth, subject matter training.

New staff training

Any new staff member needs immediate help in the areas of organizational structure, mission, and activities. Because no two Sea Grant programs are identical, training must be developed uniquely by the program administration. Sea Grant proposals, annual reports, printed media, films, reports, etc., are useful training aids.

More current views and philosophies can be transmitted effectively by audio tapes. These save repetition and are useful resources when sent to candidates prior to job interviews.

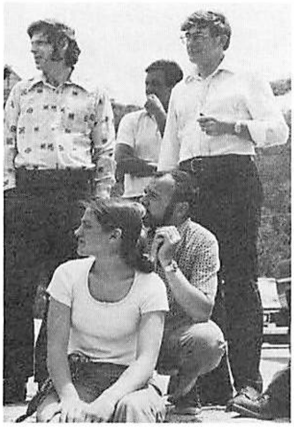
A packet of forms used by the organization, such as expense claims and car reports/regulations, as well as directions on completing these forms, are useful training components.

Within the first month of employment, each new staff member should visit key persons including the Sea Grant director, nearby Advisory Service staff, citizen leaders, and appropriate researchers.

Written material on adult education and communication techniques should be provided to each staff member.

Material on the area and discipline can be compiled from state and national Sea Grant publications.

An orientation checklist enumerating such tasks has been useful in more quickly familiarizing staff with their work and giving them a sense of accomplishment in their first month or two on the job.



On-the-job-training

While much of this will take place on a day-by-day basis, it is valuable for new staff members to spend at least a week at the offices of other experienced staff. Office procedures and a host of other details can be learned this way.

Periodic meetings of Advisory Service staff are important components of on-the-job training.

In-depth training

Attendance at short courses and conferences should be an integral part of any Advisory Service worker's efforts. Communication techniques can best be practiced and current developments and trends in subject fields can best be learned at such meetings.

Not more than ten percent of a person's time should be spent in all such efforts combined.

Program Planning

This is one of the most important tasks in any Advisory Service program. The leader can do only a component of this; the staff must do most. Therefore, one of the important tasks the administrator has is to ensure that the staff understand and carry out effective planning.

Training, counseling, and providing examples are major components in ensuring that the staff gain this skill. Program planning should have an annual focus, reflecting a long-range plan. A variety of resources should be included in developing this plan, including leaders among the intended audience. Having concrete, quantifiable educational goals or objectives should be the ultimate test of effectiveness here.

New staff should know that they are expected to have several solid objectives prepared within three months of their hiring. Such objectives should be viewed as highly tentative, but seen as important at that time. Writing these will often require several days effort by both the staff member and the Advisory Service administrator.

Program Execution

This is the most important Advisory Service role. All else is to support and enhance program execution.

The objectives prepared provide the framework for execution. The Advisory Service administrator should periodically comment extensively on an element of program execution (meetings, conferences, bulletins, newsletter) in which the staff member has had primary responsibility. This means the administrator must have attended the event or carefully scrutinized the material. The comments should include positive elements as well as areas where improvement could have been made.

Program Evaluation

Increasing the program's effectiveness requires evaluation. Again, if the staff are to achieve a high proficiency in evaluation, training must be conducted, and some framework must be created in which to carry out evaluation.

Written reports are of primary importance here; however, personal interaction (face-to-face or by telephone) is a potential alternative or, in some cases, necessary substitute.

Personnel Evaluation

Staff will also have responsibilities, though varying in degree, for the above tasks. Personnel evaluation is a component that traditionally rests more heavily on the administrator.

Two approaches commonly used are:

1. Evaluation based on achievement of objectives;
2. Evaluation based on important components of an Advisory Service worker's role.

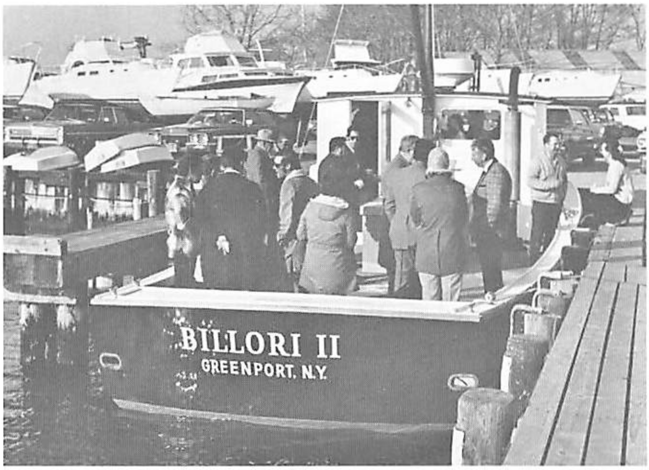
The first, based on the individual's established educational objectives, relies on the basic question "Did the individual achieve what was intended?"

The second focuses on "Does the individual demonstrate the necessary traits generally required to carry out an effective job in Advisory Services?"

The first seems more valuable in terms of stimulating program achievement, but the second seems more structured in helping both the staff member and the Advisory Service leader identify areas of possible improvement. A combination of the two seems to provide the best approach.

Creating Rapport with Other Groups and Individuals

Advisory Service work requires close and congenial relationships with researchers, state and federal agencies, industry groups, and citizens. A means of keeping them aware of Advisory Service efforts is needed. Newsletters can help, but periodic meetings seem necessary. The frequency of such meetings and the agenda will vary with the importance of the group to each program at a particular point in time.



Internal Communication of Results

Individual conferences with staff are important to demonstrate interest, provide guidance, and provide opportunity for sharing concerns. Such conferences should be held at least once every three months in the staff member's office. A conference with a new staff member in his or her office within the first month is necessary to recognize the new worker's importance.

Written reports including those described in Section VIII should be routine and responded to appropriately.

Summary

Important program leader tasks are often pushed aside by more urgent, but less important, details related to finances, office management, and the like. An interesting exercise is to identify what proportion of time you feel should be spent in each of the eight areas mentioned, then estimate how your time was spent in those areas over the past year. You too may be surprised at the comparison.

II Writing Annual Educational Objectives for Advisory Service Workers

In any work it is important to know what we are trying to do. That seems trite, yet one of the major difficulties we face in Advisory Service work is describing clearly what our activities are intended to achieve. Why bother? Several reasons exist. A clear statement of our intended results helps others see where their efforts can assist us and how ours can assist them; it permits ready comprehension on the part of those we ask to support such efforts; it gives administrators a tool to see what will not be done. Of particular significance is that clear statements of objectives give us a self-determined basis for measuring achievements. Two common problems of Advisory Service workers are reflected in statements such as "What have I achieved?" and "I'm so busy, I don't seem to get to the important things." Both can be minimized if clear educational objectives are set forth. Carrying out good evaluations minimizes those frustrations but also requires that clear objectives be established.

A Good Objective

I define a good educational objective as, "a one-sentence written statement of how people will behave differently a year or so from now because of our educational efforts."

To accept this, of course, we would have to agree that one of our roles as Advisory Service workers is to stimulate change. Indeed, I write this with the view that the Advisory Service roles are to:

- Transfer knowledge in a form useful to people;
- Stimulate adoption of knowledge by appropriate people;
- Stimulate people to conduct research needed to solve coastal problems.

Only one word is common to all three roles—people. Our role is to change people—not to generate knowledge, not to hold meetings, but to change people.

It would be helpful if you stopped at this point to get out a previous objective you have prepared or write down one educational objective for your program next year.

Really—DO IT!

To be most useful to you, an objective would normally identify:

- the audience;
- that audience's change because of your effort;
- a measurable component.

One of the most difficult aspects of writing a useful objective is establishing an appropriate level of generality. The Sea Grant Act states as an objective, "... to increase the understanding, assessment, development, utilization and conservation of the Nation's ocean and coastal resources ..."

That's a pretty broad objective. (Some would differentiate objectives that broad and call them goals.) It's non-ending, and while we can make progress toward it, it's not achievable in any ultimate sense. Also, it does not have all three elements suggested above.

Thus, most objectives useful to us should break off chunks of effort toward those broader goals or objectives.

Consider the following objective: "To have 30 marine operators attend a meeting." That seems to have the three elements suggested above, but it really doesn't. The change you really seek is not having 30 people attend a meeting, rather the meeting is a technique useful in moving marina operators toward some other change in knowledge, skill, attitude, or behavior you have identified.

Problems with yours

Let's look at the objective you wrote earlier. If yours is like most we write, it probably starts out "to help; to provide; to develop; to study; to hold; to inform, etc." Note, objectives like these usually are self-directed. They tell what you will do, not what change will occur in someone else. While it's easier to tell if we write a newsletter or inform fishermen, our role is to change the audience in some way, not simply to expose them to information.

Starting the objective with "to have" will usually get us off on the right foot. Naming the audience is next—school youth, homemakers, shrimp processors, draggers, or charter boat operators. State the audience as precisely as possible.

Now, try writing your objective again. Start out with "to have" (or other appropriate words) and be as specific as possible with the group you expect to change. Does "to have" make sense for what you wanted that audience to be able to do or know as a result of your activity?

About that audience—is it really what you mean? Some folks write objectives such as "to have commercial crabbers" or "to have youth." That means every crabber and all youth—do you really expect to achieve that? If so, your expectations of educational programs such as those done by the

Advisory Service probably are not realistic. I would suggest putting a measurable component to that audience—a total of 50 people, or a proportion, 80%. And certainly a quantitative component is better than a descriptive statement such as "most," "a lot," or "nearly all."

The general audience with which you will work was most likely identified for you, and even the subject area you initially would emphasize is largely directed by others. You were chosen because your training, interest, and abilities were seen as useful to that audience. That's why I say the audiences and the subject areas are largely given to you. (If you are an economist, it's likely some administrator felt that economics was the area to be emphasized, rather than work on fishing gear, improved sanitation, etc.)

Your unique skill and talent is required in specifying the change appropriate to that audience. You need to know the situation and the problems that education can correct.

This, of course, is not all there is to the planning process. Both a statement of the problem and a detailed list of activities to achieve the objectives are also needed. Too, annual objectives should fit within longer term goals.

Also, we should not be so wedded to the objective as to be unwilling to change or drop it. Administrators particularly must recognize and accept this.

Problems with this Approach

Two problems will creep up if one attempts to implement the above. One is not knowing how many objectives are useful. I'd argue that each worker should be able to identify four or five. The worker who notes more than seven or eight is usually generating objectives too specific to be significant for a year-long effort. As another guide, an objective requiring less than 15 days to achieve is usually too specific; those with more than 40 days will require substantial sub-objectives and perhaps indicate that other separate objectives are warranted.

The second problem is not knowing how to handle long-term basic operating situations such as office routine, fiscal matters, facility maintenance, and the like. I recommend adding them to a specific area of improvement. For example, "To have two counties provide financial support for our efforts,

and maintain existing fiscal, administrative, and physical support to staff."

Many people find it difficult, for several reasons, to adopt these suggestions.

- A major reason is captured in the thought that it's "too specific." For example, "How do we know that 50 percent of the fisherman should adopt a new trawl?" Well, if it isn't seen as useful to a significant number of the audience, then it's probably not worth doing. If it is worth doing, why not set a target and go for it? After evaluation you'll know if the target was wrong or if your efforts were weak in some way. Note too, we earlier suggested changing "appropriate people." We are not in a position to know a person's situation sufficiently well to be certain that he or she would benefit from a suggested change, but clearly there must be a significant number of such people or we shouldn't be bothering with this effort.
- Another concern is "How can new important tasks be undertaken if all our time is allocated to these previously decided efforts?" It was never indicated that all of your time should be allocated; indeed probably no more than 60–70 percent of your time should be planned for important projects and significant problems. This will permit you to respond to important, but unforeseen, needs.
- An additional argument is that important educational goals take longer than one year to achieve. Certainly they do, but annual bench marks can be established to see if we are making progress towards those goals.
- A final major problem, particularly for new staff, is that we may not yet know the needs of people. Here is one of two instances I can envision where you yourself are the target audience and where an objective "To identify three important problem areas of (an audience)" is certainly appropriate. A second instance where you are the appropriate audience is in your own professional development. Plan to increase your professional ability in some structured way.

In my mind, the most significant criticism of such objective setting is that it more clearly exposes your objectives to possible challenge by others. "That group isn't that important" or "You ought to be working on this instead" reflect such criticisms. Clear objectives do permit such detailed attacks, and many find obfuscation a neat way of avoiding or postponing this. I'd argue that good documentation of why the objective is important is a better approach to defending those objectives you see as important.

Writing objectives as described above has many benefits—a greater sense of self-achievement, better setting of priorities, and a persistent reminder that our job is to help others change.

Here are some objectives that seem to avoid many of the mistakes noted above:

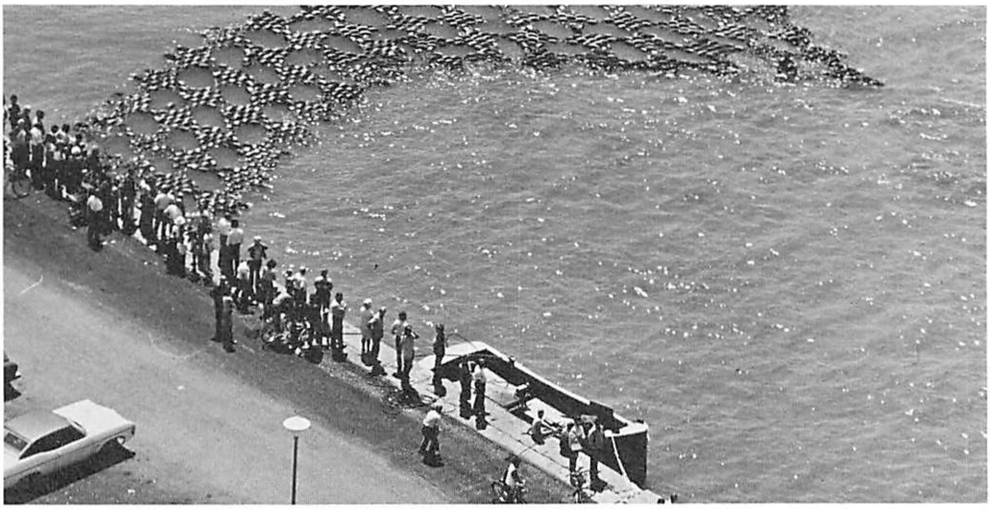
To have 50 new fishermen begin harvesting eels commercially;

To have one processor install and operate a fish deboner;

To have the average time required by marina operators to obtain a dredging permit reduced by 4 months;

To have five towns decide whether to adopt wetland controls;

To have two firms or harbor commissions install floating tire breakwaters.



Selecting Objectives

In the prior discussion on writing educational objectives, we noted that Advisory Service workers are change agents. But how do we identify to which audience and toward what changes our efforts are to be directed? This decision needs to be based on several elements, and it depends on where we are in the administrative hierarchy. Someone, or some group, is responsible for identifying audiences with whom we ought to be working. That decision will hang on the importance attached to change in that audience, the knowledge available to aid them, the probability of change (Can education have a useful influence on the outcome or are human values a major constraint?), and the predilections of the institution or individual making the decision.

Federal Sea Grant legislation directs Advisory Service attention to ocean and coastal problems. Moreover, our goals must be achieved through education. Objectives chosen should reflect incorporation of all of the above considerations.

A situation statement indicating why an important problem exists and how proposed educational efforts will help correct this problem can be an important aid in clarifying and selecting objectives.

The situation statement should describe in objective terms (numbers, dollars or some other quantifiable unit), the extent of the problem; why that problem is important to society; and the important change or changes you expect education could make in that condition. The statement should reflect emphasis on a longer term goal (three to five years) as well as carry sufficient detail to provide the base data useful in setting the annual objectives.

III Advocacy—A Pox on You

Advisory Service workers are frequently tempted to take on the role of advocate. Urging people to take a particular action or to adopt a particular idea, though alluring, should generally be avoided in Advisory Service work. As individuals and even organizations, we may find ourselves drawn toward advocacy positions. Still, most of us would agree that effective Advisory Service work generally requires a nonadvocacy stance, a stance of providing factually based information and urging others to use that information to make decisions, which decisions we as educators must accept as appropriate for the individual or community.

Right off, of course, we are advocates to the degree that we advocate using factual information in reaching decisions. But as educators we should not go much beyond that. We must attempt to keep our role to that of providing factual information, accepting that the individuals involved should make the ultimate decision. We should be advocates of a process, but not of a decision. Why? This section is intended to clarify the reasoning behind those statements and to suggest why we so easily fall into the advocacy trap.

Why Advocacy is so Seductive

Identifying the real and apparent advantages of advocacy is important so that we might better see why we are so apt to take the advocate's role.

The advocate gains support. Those favoring what you propose will speak highly of you, laud your commitment to their interest, and in general support your advocacy of their position. And rightly so. Your willingness to take up their cause eases their task, puts the burden on someone else, and, assuming you do a good job of it, attains their goals. We all like people who do that for us.

Advocacy is easy to do. One needs no facts, no understanding of the complexity of a situation to adopt a position. Even though facts may suggest that one decision is preferable to another and that certain actions will probably generate certain results, decisions can be and usually are made with only some of the facts, only some of the complexities well understood. It is easy to say, "I would do this" or "You should do that." But we are never so knowledgeable of other persons' lives that we know what they should do. They may not have the money to try new technology, or they may not be psychologically suited to the risk involved. They may gain pride from their ability to excel in their old way of doing things, and they may lose stature if a new approach is accepted. No one is certain what other element may influence a community in the future. In short, we seldom, if ever, know the "right" decision. Advocacy makes our job easier, but only if we assume that we are all-knowing.

We may be seen as more helpful. An advocate is frequently seen, at least initially, as more helpful than someone who is committed to education and nonadvocacy. The question "Should we?" will get an answer from an advocate. Educators will give a longer response, recognizing that they don't know the answer to the question. They may know the answer to the question "What is likely to happen if we . . . ?" but not to the question "Should we?" So the question as posed may be left unanswered, and that frustrates many people, both those asking and those responding!

We can achieve more in a shorter time. Individuals with narrow vision often seem to achieve more in the short run. People are apt more quickly to use aluminum groins if you describe just their advantages and describe how valuable they have been to others. Individuals are more likely to try a new trawl door if you assure them that they will like it better. Community support for new docks may grow more quickly if only the advantages are stressed. Advocacy often results in more change occurring in a shorter time than does helping individuals and communities reach decisions appropriate to them.

The Flip Side

If advocacy has all these advantages, it's clear why most of us are occasionally tempted to adopt that stance. But why is it so bad if it sounds so good? Considering some of the negatives associated with advocacy will perhaps make that clearer.

Advocacy of one position alienates opponents. Those whose positions we adopt will give us strong support, but, at the same time, others are almost always alienated. That in itself may not be bad (after all they may be wrong!), but we may lose credibility with our clients who come to a different decision. As they turn us off, we find ourselves serving only a portion of the public we are committed to aid. Even in a non-advocacy role, Advisory Service workers, being change agents, often alienate those who desire the status quo; and, in my view, as educators we can accept that reaction if we take pains not to advocate change simply for its own sake.

We don't know the proper decision. To advocate an action, you should be certain that it is desirable. The improbability of knowing with certainty the value of change to any individual or group means that we can seldom say what decision is best for someone else. We do need to believe that many people would benefit from a particular change; otherwise, why make that a focus of our educational efforts? But to be confident that many in a group would be better off if they adopt a new idea does not imply we know which individuals within the group would be benefited by the change. We can indicate that more fish would be caught with a given net. We can educate individuals as to the cost of the net, the time usually required to learn to use it properly, its disadvantages, and other details important in making a decision on whether to adopt it. But we cannot be certain that any given individual should make the switch. The very different effects of change on individuals is one reason that community decisions frequently reach such high levels of conflict.

Research is not needed for advocacy. No education, no facts are necessary for advocacy. Those can be helpful, but exhortation, misinterpretation, and misrepresentation are all techniques frequently used in strong advocacy situations. Indeed, factual information can often be an impediment to an emotional advocate's role. Thus the factual information derived from research—the important link in education and in Sea Grant—becomes of little concern.

Similarly, the important educational role of helping individuals or groups to understand the complexity of a situation, as well as the typically conflicting information on a given decision, is unneeded if one wishes simply to be an advocate.

We lose objectivity. As we move toward advocacy, we become less objective in our consideration of information. Rejecting research findings that conflict with a given position and even distorting research to generate desired results have historically been a problem of groups or individuals who are advocates. We become wedded to a solution and in extreme cases can erroneously reject valid new findings that refute the position we advocate. Thus we abort the basic process we are intending to stimulate: that of using factual information in reaching decisions.

We are blamed for failure. If an idea that we advocate is adopted and fails, we receive, and deserve, the blame for its failure. We know that a given change may prove undesirable to some persons who make that change. We can accept that reaction, and the individual typically accepts it if the decision has been made with clear understanding of the hazards. What is not acceptable is to be told the change is desirable and then to find that it isn't! The blame, appropriately so, is laid on the advocate rather than viewed as a consequence by the persons making the change. Purveying bad information is certainly one of the surest ways to lose the confidence of those we seek to aid.

Some Tell-tale Signs

People commonly phrase a question in a manner that apparently seeks our conclusion (our advocacy): "What should I do?" "Do you think we ought to?" "Don't you think we should?" The tell-tale sign of the advocate is his or her answer to those questions. The most effective Advisory Service workers do not give their conclusions, for that is advocacy. Rather, they help the individual or group clarify the issue and gain information, so the individual or group can feel more confident in the conclusion they reach. The advocate tells you what you should do; the educator helps persons review the facts and helps them feel more certain that their decision is soundly based.

In short, we must keep in mind the difference between questions of fact and questions calling for our conclusion. One of our major roles should be to provide quick and accurate answers to significant questions of fact or procedure. For example, "Will minced fish sell well at the supermarket?' can be answered, "Yes, research shows that it will sell well at appropriate pricing." "Can I get a supply to put on my shelf?" can be answered, "Getting a steady supply at a competitive price is a problem in many areas." "Should I put it on my shelves?" is a question that cannot be answered with assurance. An appropriate response may be, "Can you get a supply and market it at a price people are willing to pay?" The decision is one the store operator should make.

Some comfort. Most people find it difficult to restrain themselves from answering questions earnestly asked, even though they recognize the hazards involved. It may be of some solace to recognize that people often seemingly ask for our conclusion, not to act on that conclusion but to give further credence to their tentative decision. If you ask a peer, "Should I take this new job?" and their answer is a simple yes or no, you'll doubtless feel thwarted. Clearly, you didn't want them to make the decision! You were actually hoping they might provide additional insights and help clarify your thinking as you reach that decision. Answering a "Should I" question may not provide the help actually sought.

Summary

Nonadvocacy is often not a comfortable role. Some people do want others to make modest decisions for them. Effective Advisory Service workers avoid that trap, however, striving instead to provide the best information available while recognizing that the decision is one the persons who will benefit, or lose, must make.

IV "I Don't Have Time"

A common cry of Advisory Service workers is, "I don't have enough time." In fact, we all have the same amount of time and have enough time to do virtually anything—not everything, but any single thing. So the primary problem is really failure to do the things we later identify as important. Advisory Service workers can benefit by reading and practicing much of what is prescribed in the literature on time management. I'll not try and cover all the useful points that voluminous literature can give Advisory Service workers. My goal here is to point out some ways many Advisory Service workers find that time is lost and to suggest means of recapturing some of that time.

Time Losers

Interruptions

Time management experts note interruptions, such as phone calls and drop-in visitors, comprise major time losses. But it is those very "interruptions"—person-to-person contacts—that are essential to Advisory Service workers. That doesn't mean that interruptions cannot be reduced, but their demise would signal a weak and ineffective program. How to reduce them? By using other modes of education to solve the more common causes of interruptions.

If numerous inquiries come in on repairing ice-damaged docks, for example, developing a news article and leaflet on that topic can help reduce the time needed to respond to interruptions. The leaflet will permit others, such as a secretary, to handle routine requests, your time being freed for more specialized or detailed questions.

An impressive example of this approach was Rhode Island's solution to the numerous requests they and most other marine workers receive from elementary and high school students seeking information for their papers. "Please send me all the literature on sharks" (or whales or tuna) typifies such requests. Development of a booklet, "How to Find Marine Information in Public and School Libraries," has reduced the time needed to respond and lets virtually anyone in Rhode Island and other states help the student learn how to get such information. It also does a better job of educating students (rather than feeding them facts) that we would most likely do each time such a request was made. Note in this case that the question asked was not answered. Effectively *responding* (not necessarily answering) questions is another time saver.

Answering All Questions

Many Advisory Service workers believe that they are responsible for providing the answer to any question asked of them. Yet it seems clear that we have neither the time nor the expertise to answer all questions. Indeed, we should avoid answering or finding answers to questions not central to our role. "What is the price of hamburger?" is clearly a question to which few Sea Grant Advisory Service workers bring special expertise. Further, the answer is readily available from other sources (at the supermarket or in newspaper ads). Finally, it is not a marine problem, and solving marine problems was the major reason for the establishment of Sea Grant.

Similar reasoning suggests that many, less obviously inappropriate questions do not require an answer. A response—yes, but not an answer. To continue the hamburger example, the response to a consumer's question, "What is the price of flounder?" should usually be responded to in a similar vein: "I don't know, but you might check the fish market." That is a response, but not an answer.

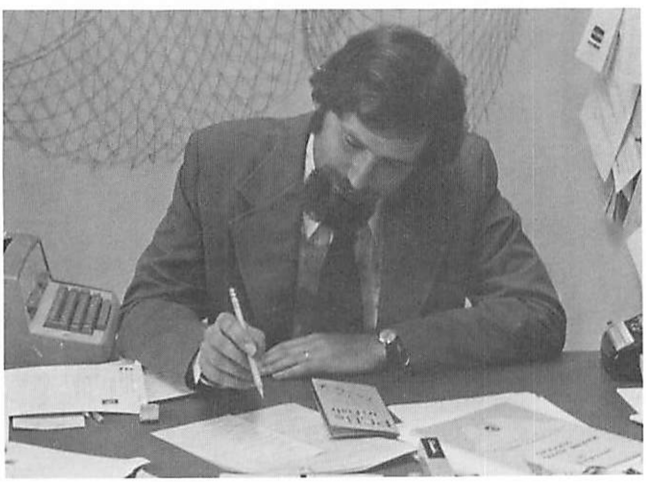
Supposing the caller, a commercial fisherman, wishes to know market prices for flounder? I would still maintain that a response, not an answer, is appropriate. The question might reflect a problem in need of Sea Grant attention—that is, fishermen not knowing how to gain current market prices. One solution would be for you to keep abreast of those prices, but other resources—the National Marine Fisheries Service market sheets and phone reports—exist to meet this need. Responding with that phone number and how to use it or with information on how to get the market sheets involves us in an educational mode: helping the person learn to solve the problem rather than solving it for him or her. Other approaches to solving the real problem reflected might be envisioned by creative Advisory Service staff (in one case a daily newspaper was stimulated to carry such prices on a regular basis). Such creativity is impaired if time is taken with providing bits of information, such as what today's price was.

An additional concern is that, by answering that kind of question, you encourage repeated similar requests. If you gave me accurate information last time, I'll come back to you. That is one way by which we develop our audience's confidence in us, but we also need to be certain they see us as we wish to be seen, and usually that is as educators, not simply as a source of facts.

Perhaps most insidious is the concern that, in attempting to answer virtually all questions, we become very active and busy, and people are appreciative. But we are reacting, not initiating, and soon we will find no time adequately to plan and carry forth the educational programs we (and our advisory groups) see as important. Busyness is not a sign of effectiveness.

Doing It All Ourselves

It is amazing how often Advisory Services staff carry out tasks that others could adequately do. It is particularly surprising in that we are committed to educating others, helping them to grow. Every time we do a task, keeping it to ourselves, we preclude others from growing.



A vivid and useful image is Oncken and Wass' analogy comparing a task or a problem to a monkey. Skilled Advisory Service workers insure that the tasks (or monkeys) on their back are kept to a minimum — not by avoiding them (then you're not needed), but by feeding the monkey (accomplishing the task) or giving it to another person competent to resolve the problem. Perhaps you have known two staff persons, each of whom gets the same number of requests, but at some point one has twenty "monkeys" needing feeding while the other has only one or two. The difference is not the number of monkeys one has received, but the rapid rate at which one of the persons is getting rid of the monkeys. Some monkeys we need to feed by, for example, responding at once to simple inquiries. Developing form letters or paragraphs for common inquiries, listing and checking off items to be done each day, and reading only the material you need to know can quickly get many of the monkeys off of your back.

Giving the monkey to someone else (by sharing or delegating jobs) is a skill most effective people have. Advisory Service workers often assume a task that others can capably perform. Let your secretary draft a response, or ask a colleague to help carry out a portion of a task for which she or he may have special skills, or which requires a skill they may find useful in the future. It often takes effort to envision how a job can be broken into components that can be handled by others, and it frequently even takes longer to help the person to do the job well the first time. However, the potential saving in your time over an extended period can be substantial.

Larger Tasks

But what about larger tasks or assignments that we are asked to undertake? Agreement to assume those monkeys should fit within our previously planned priorities. Without clarity in priorities, it is not accurate to say, "I can't." It is important to determine how significant the task is, including its significance to others, such as those with leadership responsibility, before saying no! The task's importance in achieving organizational objectives may not be entirely clear at first and needs to be considered in your decision. By the same token, a leader requesting a staff member to assume a task has the responsibility of clarifying its importance to that person and of reaching a mutual understanding of what other tasks will not be done because of this new assignment.

Time Savers

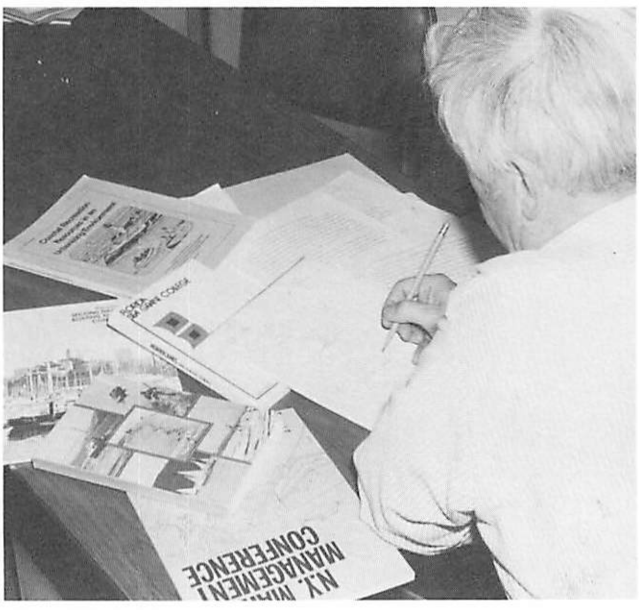
Advance thought and planning can save much time, avoid frustration, and yield better results. Two specific areas where such thought and planning can save much time are in handling proceedings and meeting deadlines.

Proceedings

Proceedings may seem a strange item to include in time management; but the great volume of time involved in developing proceedings from Advisory Service conferences and the frequency with which inexperienced Advisory Service staff get trapped preparing them stimulates me to include it. Avoid proceedings if at all possible!

Preserving new research, new findings, new views presented at meetings can be valuable. Proceedings, however, typically lack permanence; they are part of the "grey" literature. Permanence is better attained through serial publications—journals and the like—whose content is more subject to review and recall. The typical Advisory Service conference usually contains not only new but also old views, knowledge, and applications, and speakers frequently present information of varied quality and importance. Proceedings typically incorporate all of this—the wheat and the chaff. Yet the time involved in producing proceedings is extensive because of the need for a record of the speakers' comments and for the speakers' approval of the printed version of their comments.

Requiring an advance copy of comments is a normal safeguard against these delays, but often some speakers will fail to provide advance copies. Persons responsible for putting out the proceedings must then harass speakers for a written version of the comments, omit that component, or recreate it in some way. Using a tape recording for recreating the talk is full of pitfalls (failure of the recording machine and need for extensive subsequent editing, for example). Audience questions and speakers' responses can add much to a conference record, but



a tape or even stenographic record of those has potentially the same pitfalls. Great amounts of time (and money) are typically involved when proceedings are produced.

A more modest approach to capturing the major value of public comments at a conference is to print certain presentations and to use note takers (two per speaker, as a safeguard). In most well-planned conferences, several presentations are of such unique value to the intended audience that they warrant more permanency. Printing those presentations separately speeds the process and reduces unwarranted publication. There is no need to capture a speaker's ill-prepared comments with this approach, for only select presentations are printed. Time involved in production is substantially reduced, so that instead of proceedings appearing 12 months or more after a conference, that time is reduced to several months.

Meeting Deadlines

Any Advisory Service, as most organizations, has deadlines, many of them known well in advance. Most of us prepare an annual report due sometime after the end of the fiscal year. A proposal will be due at a given time. Presentations will be needed at a scheduled site visit.

Setting a personal deadline some weeks before the known or probable dates can ease time pressure. You don't need to await someone else's determination of a deadline to begin drafting the document. The draft can be written when most convenient over a several-month period rather than at the last moment. This reduces conflict with other high-priority tasks and, because of the added time available for reflecting and for gaining needed input, can enhance the end product.

Summary

Helping others become able to do portions of our work; responding but not answering all questions; not assuming tasks others should do; doing tasks expeditiously; knowing our priorities and anticipating time demands are means of managing time all Advisory Service workers can use. These approaches can help others grow, better enable us to get the important work done, and reduce one of the pressures with which we work.

V Evaluating Advisory Service Field Programs

All effective Advisory Service workers, and most of the ineffective ones, are constantly evaluating. But few communicate the results of their evaluation, and even fewer communicate them in a form of most value to others.

The focus of this section is on how we can better evaluate whether we have attained our educational objectives. I define evaluation as determining whether our program or project accomplished what we hoped for or intended and what, among the things we did to achieve that goal, worked well or how they could have been done better.

For adequate evaluation, an educational objective similar to that described in Section I should exist. Objectives were defined there as a "one-sentence written statement of how people will behave differently a year or so from now because of your educational efforts."

Why Bother with Evaluation?

One increasingly hears calls for evaluation of efforts of advisory services and other educational groups. This development suggests that inadequate evaluation has been going on or that there has been poor communication of that evaluation.

Most of us do evaluate ourselves and others, and this helps us learn how to do a better job in the future. We gain greater professional competency by learning what worked and what didn't; that's part of evaluation.

Of equal or greater importance to us is that evaluation is a common characteristic of eminently successful, effective, and satisfied Advisory Service workers. Indeed, I would argue that a major value of evaluation is that it helps us gain self-satisfaction from our work. This we all need.

Sharing or communicating evaluations means that others can learn from our experience—avoiding our mistakes and capitalizing on our successes. Evaluating whether we have attained our objectives can yield:

- Increased moral, educational, and fiscal support from others;
- Increased effectiveness of our work and that of others;
- Increased personal and shared feelings of accomplishment.

Most persons involved in Advisory Service work would quickly realize the feeling of accomplishment and satisfaction gained when someone says "I tried that, and it worked" or "I used your idea, and it was helpful."

Evaluation is something we should seek and do regularly, involving others if we can. But do we? Typically, Advisory Service workers have not conducted and communicated valid program evaluations. The reasons for this are many. Perhaps paramount is that we often don't have clear-cut objectives. But assuming we do, what holds us back from communicating effective evaluations?

Since you may question the assertion that poor communication of evaluation does occur, let's test it. Choose a Sea Grant Program in a state more than 1,000 miles from yours. Now, identify two highly effective Advisory Service programs carried out there last year, and identify how they said their effort could have been improved. Chances are, you cannot do this because the program:

- Didn't do a good job of evaluation;
- Didn't communicate it well to you.

Even more challenging, can you give me today an evaluation of your two most effective programs from last year? Only in a few cases can the answer be yes, and if it is, we can look more closely at such questions as: Did more than 70 percent of the folks you contacted provide feedback? Can you tell me what percentage actually changed because of your efforts? Have this year's efforts changed because of the feedback? Unless you can answer yes to all these questions, your evaluation needs enhancing.

Communicating Evaluation

But for now let's stick with communication of evaluation. A major problem in communicating evaluations is that we have relied heavily on verbal communication. You've told your coworkers how something worked, you've phoned the Sea Grant director to describe a very successful program, and you've surely mentioned to coworkers (at the last social hour) some things that didn't work well.

But note, this is a verbal communication. It is done very easily and quickly with little thought or time required. Note also the highly transitory nature of that communication. It's not useful to anybody who didn't speak to you directly or subsequently hear about the program from someone you told. And certainly, the evaluation is lost over time.

Written communication is permanent and easy to reproduce, permitting us to reach more people.

The hazard, of course, is that you can't readily retract a written communication or say it wasn't there. We are always more careful in writing than when speaking and much more reluctant to put things on paper than to say them. It takes longer to write something out, and time constraints often cause us to avoid writing. But, communicating evaluations in a written form is really the best and only way to share results with substantial numbers of fellow workers.

Another major impediment to putting our evaluations on paper or even voicing them, for that matter, is fear that others will judge us negatively. If you don't know my evaluation, you can't say my conclusion is wrong. If you do know my evaluation you can challenge me; so, I may seek refuge by not clearly recording my evaluation. Advisory Service workers are among those critical of researchers for not publishing research findings more rapidly, but the same concern and time constraints stalk them.

It is important to note, however, that while it may be true that someone who does not know your evaluation cannot responsibly attack your conclusion, neither can anyone responsibly support your program.

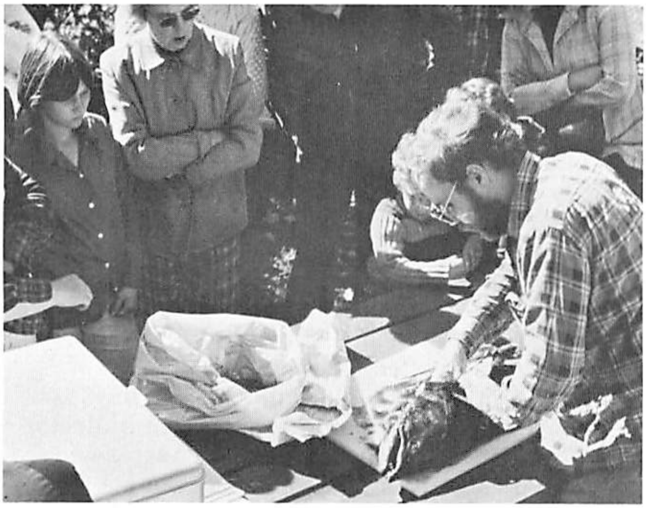
Perhaps an even greater restraint on taking time to write evaluations is the knowledge that little feedback is usually received from others, and the feedback received will often be critical. Another stimulus to using verbal communication, of course, is that we tend to get less negative feedback in face-to-face communication.

People will criticize our evaluations. Hopefully, though, we will also strive to share our positive reactions to evaluation of our peers, and they and our supervisors will do the same with our evaluations.

To this point, we have looked at the value of evaluation, the need for more effective communications of the evaluation, and the importance of providing feedback on others' evaluations.

How Much Time Is Needed?

Earlier, we said that we are not carrying out a sufficient number of "good" evaluations. The next section will discuss how to carry out evaluations that give useful information to others while requiring little additional time. The most useful evaluations, however, do require time, and the question is just how much time should be devoted to them. We are already spending some time doing evaluations, but most supervisors would say that we need to spend more time carrying out and documenting them. On the other hand, we should be leary of spending too much time evaluating and too little time educating!



Probably most of us should spend more time on evaluation and its communication than we now do. I've heard some say that 5 percent is the appropriate time proportion to spend on evaluation. I would agree that not more than 10 percent of your time should be spent on it. Further, as a simple guide, I'd argue that a written evaluation is warranted if an activity takes 20 or more days a year or brings you into direct contact with 100 or more people.

What Evaluation Won't Do

Evaluation cannot do everything people sometimes expect of it.

The strongest forms can tell us if we achieved what we hoped to. They can tell us what worked well and not so well. Properly designed, they can even suggest why those things happened.

They cannot tell us which programs and objectives should be emphasized. That requires judgment. And while evaluation can contribute to that, it cannot dictate proper decisions. Your expertise and your judgment are needed for that.

VI Measuring Effectiveness

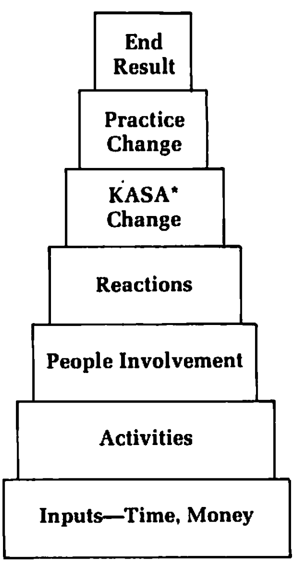
To conduct and report evaluations that have the greatest value to others, we must be able to recognize the best measures of our effectiveness. Seven indicators described by Bennett[1] can be helpful. A pyramid of those seven indicators can be envisioned (Figure 1), each rise being dependent on the lower blocks, but each typically being a more accurate measure of effectiveness than its predecessor.

These indicators can be the basis for stating objectives. For example: "To spend 10 days working on evaluation" is an objective stated as an input. "To hold two meetings on slope stabilization" is an activity statement (and is the most common form of objective written). "To have 10 landowners initiate vegetative stabilization of slopes" is an objective stated as a practice change. Evidence of attainment of objectives toward the top of the pyramid requires more effort, but evidence of their attainment more clearly indicates effectiveness.

Except for the highest block, each level is a necessary step toward, but not sufficient indicator of, effectiveness. Thus an *Input* (10 days) is needed for *Activities* (2 meetings) yielding *People Involvement* (87 attendees). People must be involved so that *Reactions* ("useful meeting") and *KASA Change* ("learned how to calculate trawl door size") can occur. Knowledge alone will not necessarily bring about *Practice Change* ("I bought larger doors") nor the desired *End Result* (lowering fuel use in catching fish), but they are required for that *End Result* to occur.

Observe several interesting things about this pyramid: (1) objectives can be written for any level, but attainment of the highest levels can require several years of work; (2) the higher levels of the pyramid yield more certain indicators of effectiveness.

Figure 1. Pyramid of Effectiveness Indicators



*Knowledge, Attitude, Skills, Aspirations

Different Requirements

Measuring effectiveness for the several levels requires different techniques, and for the highest levels typically requires actively seeking out evidence of impact.

Advisory Service workers can enhance their evaluations by noting that three rather different levels of attention are required to measure attain-

[1] *Journal of Extension Education*, March/April 1975, p. 7–12.

ment of each pyramid step. These three, and the attendant, steps are:

Level of Attention	*Pyramid Steps*
Inquisitive	End result Practice change KASA change
Receptive	Reactions
Passive	People involvement Activities Inputs

With just *passive* attention, we can push evaluation measures to the people involvement level by using information on hand or readily recorded. Even in mass media evaluation, numbers of publications distributed or media contacts made are readily available.

The reaction step can be reached with a mindset *receptive* to reactions. Take note of what people said about the meeting, the publication, your visit ("That was helpful; I found it useful"). That same receptivity will frequently catch KASA changes ("Now I know what it takes to run a charter boat"; "I didn't know you could deduct that expense") or even some practice change ("We tried that bubbler you suggested, it sure kept the boats free of ice").

To gain more than anecdotal measures at those higher steps will require more conscious attention, indeed require that we be *inquisitive* about what people have done with their newly gained knowledge.

Which levels are you currently noting and

communicating? Perhaps, like many Advisory Service workers, you're still at the lower levels, in most instances passively noting activities, and in some cases recording people involved.

Recording Effectiveness

A quick tally of three recent Advisory Service proposals found only one with more than half the activities pushed to even the people involvement level (Table 1). Inputs are seldom reported, probably because most Advisory Service workers recognize that those measures by themselves are weak indicators of effectiveness. End results are seldom possible to ascribe to our efforts alone, so those steps are not included in the calculation.

Table 1. *Measures of Effectiveness Shown in Three Advisory Service Proposals (1979)*

Pyramid Step	*Proposal A (N=27)*	*Proposal B (N=26)*	*Proposal C (N=33)*
	Percent		
Practice change	0	8	30
KASA change	0	0	6
Reactions	8	4	12
People Involvement	31	8	18
Activities	61	80	34
	100	100	100

Reports of activities are easily raised to the next higher step. Note in the examples below, the activity on the left is raised to the people involvement level by simple rephrasing, as shown on the right.

Activities Level	*People Involvement Level*
"Requests for publications were filled."	"Over 500 requests for our publications were filled."
"A meeting on flash freezing was held for fish processors."	"Eighty fish processors attended our meeting on flash freezing."

Little extra work is needed to gain such information, so even by being *passive* you can push the measure of effectiveness up the pyramid. Even if only 100 publication requests were filled (rather than 500) or only 20 attended that meeting (rather than 80), a larger number of people still might

change their practice, but change is less probable without involvement. The more people involved, the greater the likelihood more persons will learn and change a practice. Thus including the number of people involved gives a more powerful indication than simply describing the activity. Reports on most of our efforts can easily and passively be brought to the people involvement level; we need only pay attention to the value of doing that.

Reactions to our educational efforts are frequently received. "That was valuable information," or "Gee, that publication is helpful," are reactions that most of us hear about useful activities. Recording those reactions does require a modicum of effort greater than what some of us are now spending. That is but a minor change. More substantial is attaining a mindset that sees those reactions as more significant than the number of people involved.

Anecdotal reactions are helpful in demonstrating effectiveness. Even more useful is gaining specific information on what was "useful" or "helpful" and to how many. Reactions can then be moved up another step on pyramid to the change level, change in KASA or in practice. To reach the change level requires a somewhat different mindset, one of inquisitiveness that seeks to know, not just a reaction that information provided was useful, but what aspects of that were learned or put into practice. Inquiring, "What in that publication was most valuable to you?" or "I'm pleased you found the meeting useful. What was new to you?" frequently yields anecdotal indicators of KASA change.

Change in practice also frequently becomes apparent if we are inquisitive. Your asking, "That's well-treated piling. Where did you get it?" may reveal that better piling is being used because of information provided through your efforts to increase use of properly treated pilings. Or asking, "Have you decided which freezing system to use?" can indicate practice change. An inquisitive frame of mind is needed, but note also that more time is required to identify and record strong indicators of program effectiveness.

Number Crunching

Another important alteration in procedure occurs as we move up the pyramid to the reaction level. Several instances of change are less evidence of effectiveness than when many change. That 2 of the 500 persons who received a publication felt it was useful (a reaction) is less evidence of its value than if 50 found it useful (150 is even stronger evidence). It is here that surveying a part of our audience (a sample) begins to be important. This can be as simple as asking 10 people at a meeting what they gained (if you are going to be inquisitive, you might as well move one step higher and learn of any KASA change). Or the activity may be of such significance that you wish to collect the information in a structured form using a questionnaire (or other means) and an identified sampling scheme. Time and additional effort is required for such structured evaluations.

Another time requirement creeps in as we attempt to determine practice change among an audience. Practice change cannot take place until some time after KASA change has occurred. To determine if practice change took place, you must contact people involved in the activity at some later date, and this means that you must be able to reach them, by phone, mail, or personal visit. With that degree of effort, a structured evaluation is desirable but again additional attention and time is required.

Summary

As one ascends the pyramid, more conclusive indicators of effectiveness can be gained. Beyond the lowest levels, this will require somewhat more attention and time than many of us now commit. Most of us can move a step or two up the pyramid with little additional time and effort. For those interested in using the most powerful indicators of change, structured evaluations, described in the next section, are necessary.

VII Enhancing Evaluation

We've seen the values of evaluation and the potential threat they provide us as individuals. Maximum benefit and minimum threat can accrue from "good" evaluation. A good evaluation tells us (or someone else) what we want to know, typically whether we achieved what we intended to, and identifies the weak and strong points in the approach chosen. Evaluation requires:

- Knowing what we intended to do;
- Knowing prior conditions;
- Knowing important influences on our audience.

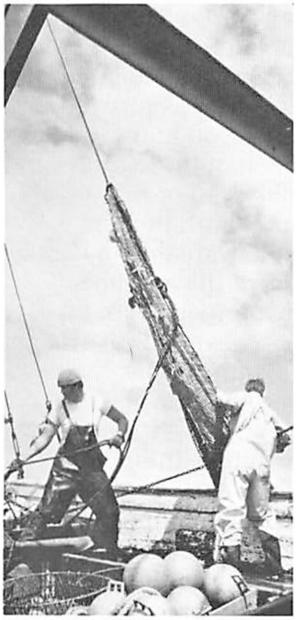
To evaluate we have to know in clear terms what we intended to achieve. Thus, an objective "to help fishermen" could be evaluated. Tying one knot for a sports fisherman would achieve the objective, but it's unlikely that's what we meant. Is the problem here with the evaluation or the objective? Even saying "to help commercial fishermen" is not very useful—buying a pound of fish could achieve that objective. A clear objective that can be evaluated might be: "To have all draggers in Freshport able to mend their nets." (An 80% level would seem more reasonable.)

We now have a clear objective. Do we know the present situation? Perhaps all draggers already are able to mend a net, or maybe one-third or two-thirds now do it. Or perhaps because it is a new dragger fishery, no one is able to mend a net.

If we know the prior level of competency, we can evaluate our effectiveness. The example used suggests a skill should be learned (not taught, there is a difference that is important for you to distinguish). How do we evaluate? We could ask people if they can mend a net, or we can determine by test or observation that they can do so. But note the objective said *all draggers*. Thus, if one dragger cannot do it, you've not been fully successful.

An Example

Let's assume your educational efforts consisted of two identical meetings at which instruction was given and fishermen could try their hand at learning how to mend a net. The proportion able to do so at the end of each meeting would give one evaluation. For example, there are 100 draggers in Freshport. Fifteen attended the first meeting and 25 attended the second. By the end of the meetings, 35 of the 40 could mend nets. You knew about 30 non-attendees knew how to mend nets, so about 65% of Freshport draggers can now mend their nets.



Personal instruction to five others plus eight others who picked it up from those at the meeting is evidence your more reasonable objective was basically achieved. Note here, observation was the evaluation technique used. This is a good technique when applications or skills are the intended goal.

Of course, it's an easier evaluation to say 40 attended the meetings, but that is less valid as an evaluation—after all, our role is not to hold meetings, they are a technique used to achieve other goals. Since 25 attended the second meeting, it might be useful to clarify if that was because the first was so well done and word got around, or if the lower attendance at the first meeting was because of the time it was held, the location, etc.

Observation is a relatively painless evaluation technique but requires personal presence. This can be extremely costly if your audience is dispersed. Also, most things we work on probably are reflected more by a change in knowledge than in observed physical applications or skill. But let's not forget that the knowledge or even attitudinal changes we endeavor to achieve almost always have an eventual goal, a behavioral change. If the audience will act identically, with or without the knowledge we provided, then we are useless.

How do you evaluate knowledge gains? First, do it only as a last resort. Behavioral change is our main goal. But knowledge gain can also be discerned. We can ask people either verbally or in writing if they can recite the items we wanted them to learn. An even better test is to see if they retain that knowledge as time goes on.

There are substitutes for testing whether a person gains knowledge. We can determine if she was exposed to the information; we can ask her if she feels she gained; and we can even see if she resubmits herself to new opportunities. All these give us a measure of values she attributes to the new experience.

Whom to contact

What group do we ask or observe? The group we intended to change can be one group, or we might restrict it to those we know were exposed. In either case, the same group should give evidence of "prior condition." Thus, you wouldn't say we want 80% of the draggers able to mend a net and then say 87% of those attending the meeting could do so; therefore we achieved our goal.

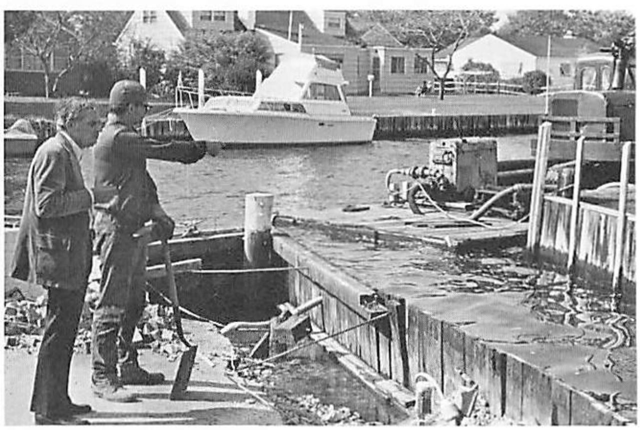
How many do we ask or observe? It is not necessary to contact every person in the group. It usually is not feasible physically or economically. The major point is to be as unbiased as possible about it. Don't just contact those you know; contact others as well. And go after each of those folks hard! You probably need to check 10 or more persons for others to have much faith in your results. In our work, it seldom is valuable to contact more than 200 persons or 50% of the audience, whichever is lower. A simple approach is to take every name at some interval, say every 2nd, 4th, or 10th person, and use them as your sample.

By now, certain things should be clear in enhancing your evaluation:

- We need to be clear about what we intended to do;
- We need some idea of whom we tried to reach;
- We need some idea (even if only a hunch) of the prior situation relative to the change we seek to make.

Let's consider as an objective "To have 30% of prospective Loran A buyers over the next year be aware that Loran A will shortly be phased out."

We should ascertain how many now know that. Knowledgeable people may say few do, and that may be okay. Usually, someone can benefit from that knowledge, so we will set a target number or percent that should know this change is imminent as a result of your efforts. It may be 30 or 50 persons or 30% of the buyers—you set the objective. And how do you isolate that audience? That's one part of the creative educator's role.



Checking the Parts

Articles, meetings, and bulletins can be used to achieve objectives. They should be evaluated. A "before and after test" at a meeting is very simple and, if done with clear explanation as to why, can be very useful. Note here, you isolated your audience (those at meeting) and have queried all of them (most but not all will cooperate, but it's relatively unbiased and it's a quick and inexpensive approach). Also note, however, you aren't evaluating the objective, but rather one component of the effort to achieve that objective. Similar evaluations can be done with virtually all segments of our program.

What should we include when asking people? Three groupings would generally be included:

- Information on the respondent;
- His or her reaction or change;
- A means of stimulating him or her to respond.

Some Other Forms

The illustrations used here have been structured evaluations of educational objectives or activities. Other forms of evaluation include:

- Quantitative indices of effort or participation—40 people attended meetings on net mending, and 200 known Loran A users were sent a changeover notice;
- Subjective appraisals—"I thought you guys did a great job";
- Anecdotal—The tale of one person whose life was saved by your program on boating safety.

The last is an unscientific, highly biased evaluation and one of the most effective means of generating support and understanding, but only if it is *communicated*.

Many of us respond to the need for evaluation by saying, "I should do it, but I don't have time." You now know that is wrong. It is a natural and active part of our job. Our challenge is effectively to communicate evaluations and to make them valid and useful.

VIII Written Reports for Advisory Service Workers

No public agency survives very long without some form of written report. Is this because of bureaucratic red tape, or is it because they serve essential purposes?

Clearly, they do serve essential needs. Clarifying what these are, how they can best be achieved, and how to stimulate people to provide written reports can be of particular value to Advisory Service administrators.

Written reports can serve many functions. Among the more important for the Advisory Service worker's purposes are:

- Record of accomplishments and failures;
- Record of what works;
- Record of what doesn't work;
- Record of names and organizations with whom we worked.

These have value to the individual worker (and those who may follow him or her in the position), administrators, and higher echelon decision makers, including the public.

No single reporting procedure will meet the needs of all interested parties. For example, names of persons worked with usually have little value beyond the administrator's level. Similarly, failures are seldom usefully shared with the general public.

This section focuses on written reports intended for the individual, fellow workers, and those involved in administering state Advisory Service programs; and it is directed to those administrators.

Stimulating Staff to Write a Report

The individual must first be stimulated to write a report. Clearly, several stimuli are available. It may be a directive, but are you willing to make this sufficiently important and enforce it? A more productive approach will seek to stimulate the individual to see the report as useful to him or herself and worthy of taking the time required to do it.

Why should the individual do it?

- To help others benefit from the experience;
- To get better aid and inputs from those who read the report;
- To gain support from others;
- To benefit from others' experiences by reading their reports.

To get staff to write reports:

- They must know what is wanted in the report;
- The reports must be simple to do;

- They must know others do use the reports;
- They must know it is viewed as important by others.

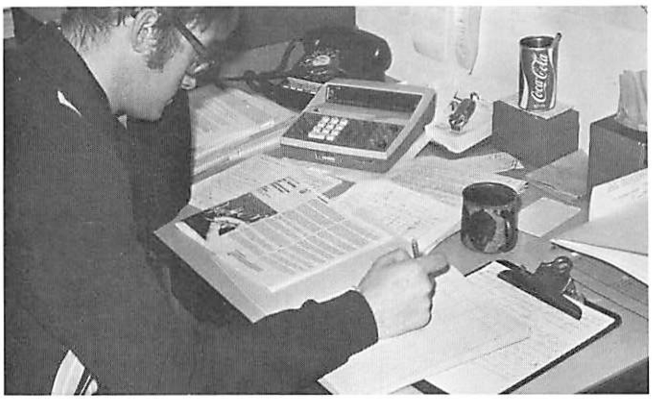
Knowing what is wanted

Suggestions of what to include will be clearer if the staff is periodically reminded of the purposes reports can serve.

Feedback on how the information was useful and helpful clarifies what is wanted.

A listing of important considerations will help in implementing report writing. One such listing to an Advisory Service staff was:

- Emphasize in the narrative why a thing was done, what was done, the result, how it could have been done better, and what worked well;
- Don't tell everything you did—it's not an activity report;
- Use hard numbers where possible: not "a large crowd" but "145 persons";
- Completed activities should make up the bulk of the report. Don't note for three months running that you're working on such and such;
- Be concise and precise. Seldom would more than one page single-spaced be needed in a monthly narrative;
- Even if more than one agent in an office is involved, have only one person report the activity;
- Human interest anecdotes of accomplishments are very useful;
- Keep your individuality!
- Note where you've used others' ideas or have ideas others may find useful.



Simplicity

This conflicts with an objective of completeness but is important if busy staff are, in fact, to write reports.

Brevity is of importance to both the writer and the reader. Thus, only significant items should be included.

Routineness has value. While a form is useful here, the disparate nature of significant activities seems to argue against a very detailed form.

Knowing when reports should be done can aid in routineness. If one a month is expected, it can be a month-end routine (along with expense claims). Some apparently find weekly or quarterly reports satisfactory. Others claim a weekly report is too frequent and quarterly reports are too infrequent to permit including important and timely items. A report only when "significant" activities take place can work but seems to suffer from clear placement in a routine. There is one clear advantage of "timely reports" and weekly reports—agents will often share more recent or current material; however, verbal sharing or memos do this as effectively, perhaps more so.

Knowing others use it

Reports can become so routine that no one bothers to note how they are being used. This deters staff from doing reports in the future. Consistent attention and response to reports with liberal feedback to the writer is essential to maintain production of reports. Feedback several times a year to each person would seem minimal.

The Advisory Service administrator, who has a key role in providing feedback, must also ensure staff provide feedback to each other on the usefulness of reports.

Tell them how their report aided others and have them tell each other!

Knowing it is important to others

The administrator must achieve this by example (getting reports out on time) and also by statement. When reports repeatedly are not sent in, a visit to that person is necessary. This should not be done to harass, but rather to remind that person that input is important.

There are many ways to demonstrate that writing reports is important—hold sessions on writing better reports and comment on reports at staff meetings.

Also, don't go back for similar statements; let the staff know these reports will include their accomplishments and that no further listing will be called for.

Summary

The values of report writing to an Advisory Service administrator are many; they include:

- Easing the writing of annual reports and listing of achievements (such as on NOAA Form 2);
- Serving as an indicator of performance of staff;
- Indicating areas of inactivity useful in directing program emphasis;
- Spreading useful experience among the staff.

Written reports are needed, useful, and easy to generate, if program leaders are concerned and emphasize their importance.

IX Writing Advisory Service Proposals

The proposal submitted to the Sea Grant director, and eventually the National Sea Grant Office, is a key document to an Advisory Service program. Typically, its development is one of the major responsibilities of the program leader. Significant in garnering financial support, the proposal can also serve to capsulate where the program's Advisory Service has been, and where it plans to be in the not very distant future. It can serve as a guide to what, how, and why the particular Advisory Service functions as it does and alert others to what will be similar and different in its future operations.

There is no uniform format for Advisory Service proposals, so these views reflect one person's perception. The validity of them can perhaps best be tested against the reader's own experience.

Purposes of Proposals

As in most writing, it helps to know what you hope to achieve with the proposal and who its key audiences are. As noted above, the Advisory Service proposal can achieve several objectives including:

- Stimulating others to maintain and increase their support for the program;
- Recording major changes and accomplishments;
- Charting future paths and actions.

The key audience always includes National Sea Grant Office staff and others on the "site visit" team, although the latter typically are not known when writing the proposal. Where Advisory Services are part of an institution receiving a coherent or institutional award, the Sea Grant director is also a member of that key audience. University administrators, various Sea Grant leaders in the state, and others may at times be included in the group of readers for whom the proposal is structured.

Inclusions

The strongest Advisory Service proposals seem to result when several important elements are present. Absence of one or more of these elements typically results in major questions in the minds of those reading the proposal, questions which can seldom be orally responded to with equal clarity or conciseness. Those elements include:

- The philosophy underlying the Advisory Service in a given Sea Grant program;
- The long-term emphasis of the Advisory Service program;
- The structure of organization and staff to carry out those programs;
- Evidence of impact from the previous year's effort;
- Expected results of future efforts.

These elements alone will not achieve the purposes of the proposal. As in most writing, clarity, preciseness in choice of words, use of the active rather than passive voice, and use of quantitative units where possible are additional elements that help others in reading and fully understanding the past and possible future attainments of the Advisory Service.

Program Philosophy

The philosophy dominant in a program provides the framework within which the proposal can be understood. Differing philosophies appear to dominate the approach to Advisory Services in different institutions. Some are oriented toward service or consulting, others toward public information and the mass media, still others toward production of publications. Panshin and Wilkins in "Effective Marine Advisory Services" (Office of Sea Grant, 1978) prefer a philosophy of education that stresses use of knowledge by intended audiences. Whatever philosophy is emphasized, it seems essential to describe it clearly. This may appear an obvious need, but its frequent absence from Advisory Service proposals suggests it is not obvious.

Long-term Program Emphasis

A clear, succinct statement of the long-term objectives or emphases of the program is needed. Such statements can also serve as the objectives to be identified on the 90-2 forms. When objectives are portrayed clearly, cooperators and staff can more easily see (and administrators can be reminded of) the longer-term emphases within which individual activities and programs would normally fit. Such emphases may, indeed should, change over time, particularly as needs of specific audiences vary. They should, however, be of such significance that their importance is evident over several years.

Examples might include:
- To implement problem-solving educational programs with commercial fishermen, small port authorities, and marine contractors.
- To provide feedback to researchers and administrators on research needed by coastal users.
- To expand programming conducted jointly with other agencies and groups.

Organization and Staffing Structure

Conduct of Advisory Service work requires some institutional structure and staff, even if only one person is involved. More typically, several professional staff are involved, and a succinct description in the proposal of the organizational structure and staffing becomes a real challenge. Graphics, in the form of an organization chart and a map of coastal regions indicating staff locations, are helpful for those not intimately familiar with a given institution's program. Note, too, that many interested readers are concerned primarily with the role a position performs, rather than the name of the individual in that role. Perhaps because Advisory Service work is focused on people, many proposals describe what "Jane Doe" does, where she is located. It seems more relevant to describe why the position is where it is and the foci of the position.

This section is frequently the most appropriate place to clearly note additions or deletions of staff positions with discussion of why those changes are seen as necessary.

How much "history" of the Advisory Service in the Sea Grant institutional program to include in the proposal will likely vary with the status of the current organizational arrangements. If those arrangements are stable, little is gained by lengthy discussion of organizational arrangements. Reference to earlier proposals or other documents can provide that more detailed view. Recently established programs or those where major shifts have occurred in institutional structure involving the Advisory Service can fruitfully provide more detailed discussion of this element.

Past Accomplishments

Knowing the philosophy, the long-term emphases, and how the Advisory Service program is structured and staffed, someone reading the proposal will certainly wish to know what has been accomplished by programs and activities in the recent past, for the past is prelude to the future. Since there is no way to be certain of what will transpire in the future, judgment on whether what is proposed is likely to occur will rely heavily on demonstrated past effectiveness.

Thus, clearly identifying impact and accomplishments is of major importance in an Advisory Service proposal. As a major force for change, such evidence should be readily available to Advisory Service staff, assuming that evaluations (perhaps as described earlier) have been recorded in the normal course of events. With such evidence of impact and accomplishments available, merely some background discussion and placement under the major emphases previously described would be required.

One need read only a few Advisory Service proposals to be struck by the substantial differences in the impact from using the upper steps of the hierarchy of evaluation discussed earlier. The following statements all describe the same activities:

- Meetings on federal and state income tax laws were held for commercial fishermen.
- A total of 215 commercial fishermen attended 6 meetings on income taxes.
- Nearly 20 percent of 215 fishermen at 6 income tax meetings indicated they had gained new information.
- A minimum of $35,000 in tax savings were reported from a 20 percent sample of 215 commercial fishermen attending our income tax workshops. One person (not in our sample) noted he expects to save $3,000 per year at retirement, from what he learned at those sessions.

Most of us can quickly see the applicability of that hierarchy to economic measures, but it has application to most other Advisory Service activities as well. Note the different impact of these statements:

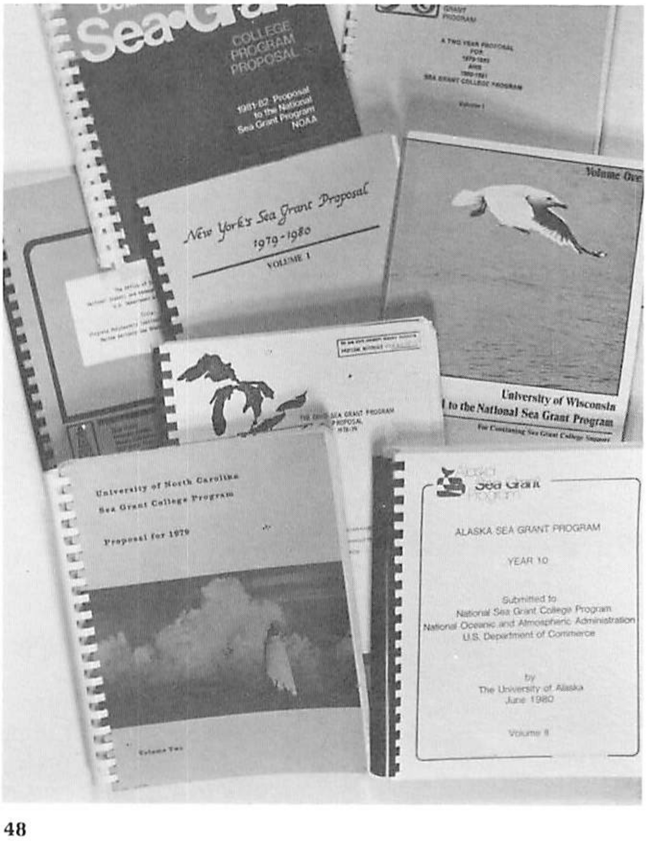
- Fifty news releases were prepared.
- News releases were sent to papers having coastal audiences.
- Newspapers with 147,000 readers received 50 news releases.
- Six of 20 newspapers reported "regular" use (3 or more per month) of our weekly news release. Five other papers reported "some use" (1 or 2 per month). All but one of the remaining papers used

the releases "occasionally." Thirty thousand readers are reached monthly by these stories. In one test (offering a recreational clamming leaflet), over 400 responses were received.

Too many Advisory Service proposals are weakened by bland statements noting activities undertaken or, worse, noting how much time was spent on a given activity. Attention to documenting accomplishments, i.e., EVALUATION, throughout the year by all Advisory Service staff and insuring that those are communicated to the program leader eases proposal writing and results in a much stronger proposal.

Expected Future Results

It is important that one note the great accomplishments of the program last year, but a proposal is for the future, not the past. What is proposed over that future is of critical importance to an institution's Advisory Service program. The proposal is one place the leader can depict a longer-



range picture for the Advisory Service program and thus substantially influence its realization. Development by all staff of objectives and activities planned for the major emphasis of a program are needed. Annual objectives, as described in Section II, can provide a clear picture of the major foci of work for the coming year. If they are well written, such objectives can frequently be transferred directly to the proposal. Noting, in addition, some of the major activities to be undertaken to attain the objectives is helpful to those who will review the proposal.

Budget

The approved budget, in the end, permits or precludes attainment of the objectives described. An Advisory Service program leader must know how the Sea Grant director will approach the question of an "appropriate" budget for this component of the Sea Grant program. In some cases, a rough proportion (say 30 percent) of the total budget is established, and this provides a framework for planning. In other cases, Advisory Service personnel request funds required to do the tasks they envision. This approach can cause problems if the visions of needs held by the Sea Grant director and Advisory Service program leader are not somewhat similar. If unconstrained by reality, an Advisory Service leader's view may be too grandiose, for these budgets differ from those for research projects in several ways. Of critical importance, salary support for full-time staff (including indirect costs and fringe benefits) represent 70 percent or more of most Advisory Service budgets. Program leaders and Sea Grant directors must recognize that and be particularly conscious of the long-term impact of adding new positions.

Fixing the proportion of the total budget available to the Advisory Service helps insure that this component receives equivalent treatment to that received by research and education, each experiencing expansion, if warranted, or contraction with total program funding. Such delimitation also can help mute such otherwise persistent concerns as "Advisory Service is consuming money that ought to be in research."

Involving Advisory Service staff in developing a proposed budget, for themselves or by field office location, can aid them in anticipating their program costs and exercising self-control over their expenditures. Accounting policies established by the institution will determine the most applicable internal controls. Where possible, a single account for salaries and associated costs, with separate accounts for other budget items by individuals or office location, has been found advantageous. As discussed below, such accounts might (or might not) be actually displayed in the proposal.

Tying It Together

Assuming all the foregoing components are needed, how do they best go together? A cook with all the proper ingredients still needs skill and creativity to produce the best results. Advisory Service leaders must exercise skill and creativity to get the best result when putting together their proposal. No cookbook exists that one can follow to get the best Advisory Service proposal, but as the supposed ingredients have just been discussed, some recipes will also be suggested for putting it all together.

One Project or Several

Some prefer a single Advisory Service proposal with one budget and one principal investigator (P. I.). Others prefer to develop several Advisory Service projects with budgets and P. I.'s for each one standing relatively independently. A third group prefer some combination, for example, having an overall program statement and budget, as well as subunits with budgets and associated programs identified.

Such subunit budgets may be most useful if the person who oversees Advisory Service is primarily a coordinator, with decision making lodging in others. But subunit budgets seem less useful if one person has primary responsibility for insuring that a more integrated Advisory Service program takes place. As noted earlier, advantages of subunit budgets can be gained, without necessarily including them in the proposal. One possible advantage to separate subunits is the greater opportunity they provide for staff to gain experience in developing proposals, reducing or at least altering the work required by the program leader.

Creating subunits within the Advisory Service proposal seems to have merit, then. Basing the subunits according to primary audiences, problem thrusts, or geographic regions seems to have many of the benefits of subunits noted above, with few of the disadvantages. Developing subunits by audience, topic, or region has the added benefit of facilitating demonstration of the interlocking nature of a program's effort, rather than stressing different roles of individuals. Synergism should occur as individuals work toward common Advisory Service objectives, and the reality of that should come through in a proposal.

Ordering

The introduction is an obvious section of any proposal, and little debate occurs over where this portion belongs. As the lead overview, it often seems too long and, with surprising frequency, often notes important coastal problems that are not subsequently referred to. Noting the coastal sectors of a state or region upon which a program focuses seems essential in this section.

Program philosophy fits well next, followed by discussion of long-term emphases. Description of organization and staffing fits reasonably well either before or after amplification of those major program directions.

Recent accomplishments and future objectives are best placed late in the proposal, although these too can be grouped by region, problem, or principal investigator, depending on subunits used. Although it might seem that future objectives best follow accomplishments to date for that subunit, I have not found that to be so, perhaps because that order forces the reader periodically to shift from past accomplishments to future plans and back again. One can readily lose sense of whether a given item is something that has been done or is to be done. Placing all future objectives for all subunits together with their major associated activities at the end of the proposal is one means of avoiding this problem.

Length

The appropriate length of a proposal varies with the size, complexity, and stability of the program's Advisory Service. It should be long enough to cover the earlier points, but not so long (nor dryly written) as to discourage readership. It will be necessary to omit many activities, for typically many "worker-years" of time are involved. As a rough guide, for programs with only two people, 5–10 pages seems necessary. At the other extreme, proposals for programs with 15–20 staff would most likely require 30 or more pages to adequately cover the previously noted materials.

Summary

A well-written proposal can provide a benchmark of major program accomplishments; it can also clearly lay out future directions so colleagues can aid and assist in components; and it is more likely to result in the needed financial resources being available to do the job. It is, or should be, a major document in the life of an Advisory Service program.

It typically differs from a Sea Grant research proposal in several ways. For one, Advisory Service is a continuing effort. But it should be neither so traditional as to lose flexibility, nor so changeable as to thwart long-term effectiveness. Perhaps of most significance, results should be far more demonstrable than in research proposals because of the Advisory Service's role in aiding coastal audiences to use new knowledge.

The proposal can serve to bring together many pieces of Advisory Service work described in preceding sections of this booklet. The situation statements *(page 13)* can meet the need for describing long-term program emphases. Periodic written reports *(page 27* and *page 40)* can provide results of previous projects. Annual educational objectives *(page 8)* can indicate expected results of future undertakings.

Some persons view proposals as a necessary evil, burdensome, time consuming, and something to be dashed off as quickly as possible. On the contrary, I would suggest that writing the proposal is a most significant task for the Advisory Service leader and staff. Writing proposals in the manner suggested does require hard thought and does require some time. Neither of these should be burdensome if needed information has been gained over the year.

A proposal cannot substitute for a strong Advisory Service program. A well-thought-out, well-written proposal can increase the likelihood of the needed support being gained for an effective Advisory Service program to be undertaken or continued.

X The Site Visit

Sea Grant is unique among academic funding agencies in its site visits. Held every year or two at a location chosen by the institution, the site visit provides an unusual opportunity for those requesting funds to discuss their request in person with many of those who will make judgments on the merits of the proposed work. That same site visit team will also make recommendations on the work and on the funding to carry it out.

The biases and perception brought to the visit by individuals will vary with the makeup of the team. Such teams typically include representatives from the National Sea Grant Office, academia (including other Sea Grant programs), user groups, the Sea Grant Advisory panel, and related federal agencies. The judgments and recommendations of that group are materially affected by the site visit, positively for some projects, negatively for others.

One or more members of the team will commonly be asked to focus on Advisory Service projects and to consider a series of questions in reviewing this part of the institution's program.

The visit seems typically to reinforce or modify judgments tentatively reached by the team members' review of the written proposal; it seems seldom to reverse that judgment. The site visit can primarily clarify, amplify, or demonstrate the reality of what has been gained by others reading the proposal. The site visit and proposal are entwined, but it is the proposal that first creates expectations and images in team members' minds. The proposal is also the only written record of what is proposed to be done and agreed to. For both reasons, the proposal warrants primary attention.

Because of the unusual nature of the site visit—specifically, those proposing Advisory Service work being questioned (some would say interrogated) in person—it is often viewed as a more memorable, and potentially threatening, experience than merely writing a proposal. Indeed the site visit seems to have many elements of personal threat present at graduate oral examinations! Thus one can end up with a much higher, or lower, sense of personal effectiveness than typically occurs when writing a proposal.

The apprehension or exultation with which one anticipates a site visit may well prove to be justified, for the presentations do have impact on judgments concerning future funding. Recognize, though, that judgment is typically formulated from the site team's reading of the proposal before the site visit begins, with the site visit more likely to reinforce, rather than alter, that preliminary view.

Concern can be reduced if some major purposes of the site visit and of the site visit team, as well as your own, are kept in clear focus. This section is intended to help in that, increasing the likelihood of a positive judgment being made of the Advisory Service work proposal.

What Leads to Positive Judgments

Recognizing that varying attitudes are brought by team members to the site visit, experience suggests generally uniform reactions can be expected from the team to certain elements (less uniformity appears in reactions of individuals). Elements that usually reinforce or create a positive view of an Advisory Service program by a team include:

- Capable management of the Advisory Service portion of an institution's Sea Grant program.
- Advisory Service having technically competent staff who interface effectively with intended audiences.
- Strong ties to other NOAA components including Advisory Service efforts in nearby states.

Let's consider each of those more carefully:

Capable Management

Some would maintain that Advisory Service proposals get less critical review than research proposals. The magnitude of most Advisory Service efforts (3 or more FTE's is typical), the length of time often necessary for initiated programs to achieve impact, and the great variability in local situations preclude most persons from attempting to judge the validity of all but a fraction of specific programs proposed. Those factors may also inhibit reviewers from having full comprehension of the significance of accomplishments achieved.

As with management of the Sea Grant institutional program, the tendency is for site teams to consider Advisory Service work in its totality, rather than by subunits. One major judgment often made by team members is "Are those who manage Advisory Service projects asking the proper questions, gaining appropriate answers, providing effective direction and influence on others?"

One test of that is the coherence, logic, and thinking portrayed in the proposal with verification (or refutation) reflected at the site visit. Note that this, and the other three elements identified above as salient in building a positive image, can all be tested on site. But that testing is not restricted to times formally assigned for presentation of Advisory Service proposals to the site team.

Having actual experience on a site team quickly leads one to recognize that for Advisory Service, as for education and research, proposal judgments are influenced by actions and comments of various individuals of the host institutions throughout the time the team is visiting. How involved is the Advisory Service program leader in decisions impacting all three program elements of research, education, and Advisory Service? Is the leadership known to, and do they know, involved researchers? Impressions on such matters are gleaned and tested in many ways during site visits.

Staff Competency and Interaction with Users

The preeminent role of these elements should be clear: staff basically determine the effectiveness of Advisory Service programs. Change occurring among users (as described in earlier sections) is the major test of staff competency. The degree of interaction, even the mode and reaction of users to interaction, can become much clearer at a site visit. Responses to questions of site visitors are commonly presumed to be similar to those a user might experience. When answers are clear and accurate, a positive impression is left.

Integration with Research Components

The advantage of coordinating programs between research and Advisory Service, with the latter's attendant responsibility to extend and influence components of research, is frequently voiced. The site visit permits reality testing. The proposal typically asserts or gives examples of such interaction. Team members' judgments on how pervasive, how deep, how much influence research has on Advisory Service programs, and Advisory Service staff have on research to be undertaken in this program, will be clarified during a visit.

Ties to Other Agencies

Advisory Service program integration and cooperation with other agencies and groups, particularly within NOAA and with Advisory Service in nearby states, is generally viewed positively, while usurpation or interference with the appropriate role of others certainly is not. Discussion and probing questions are common means by which site team members confirm or alter their preliminary judgment.

Objectives for the Site Visit

Knowing the above four elements of importance to the site team, Advisory Service staff can begin planning for the visit. As with most educational efforts undertaken by Advisory Service staff, planning for the site visit will be enhanced if your objectives for the visit are first established. Objectives of Advisory Service leadership at a site visit might be:

- To demonstrate to the team the effectiveness of the Advisory Service program and its ties to users, researchers, and agencies including other NOAA components.

More than one objective can be met, and so a few additional ones may be important and appropriate to add. Examples might include:

- Providing the team a better grasp of problem situations being addressed by Advisory Service staff and researchers.
- Gaining ideas for doing the job better.

Structuring the Site Visit

Knowing our audience and our objectives, we can consider techniques for attaining the objectives, that is, what to do at the site visit. The structure of the visit will of course depend upon acquiescence of the Sea Grant director and the Office of Sea Grant Program monitor. It should be recognized that most of the time scheduled for the site visit will typically be spent on the research portion of the program. It is the portion normally in greatest flux and it relies on individuals whose Sea Grant involvement will be but a modest portion of their year's work.

Thus the time allocated to Advisory Service is quite limited, one or two hours being common. That constraint can be overcome, not by usurping more of the formal presentation time, but by creating other opportunities for attaining the objectives laid out. As professionals who have adult education skill and experience, Advisory Service staff should be particularly adept at creating situations where their site visit objectives can be achieved.

Some examples of techniques that have seemed to be effective are:

A. Getting site team members where the action is. Creating opportunities for team members to spend a well-planned day or half-day in the field can help attain several objectives. Visits with key members of the Advisory Service audience at their place of work, with researchers at field locations, and perhaps with other agency staff provide opportunity for clarification, reinforcement, and reality testing. People typically respond to people; letting intended beneficiaries discuss the results of Advisory Service work can be a powerful indicator of the technical competency of those staff and their interaction with users, researchers, and other agencies. Such a tour can also serve to demonstrate the educational skill of staff in one important educational technique—so tours should be exemplary.

Tours or field trips can also clarify for team members the magnitude and reality of the problems being addressed. It can help focus their thinking on problems unsolved and give them an opportunity to provide new insights and ideas of possible solutions.

Not all team members can or will make such a tour. But experience suggests it can be a useful technique for achieving some of your Advisory Service site visit objectives.

B. Bring the action to the team. Involving Advisory Service staff in presentations of research they helped stimulate or are linking to users is a variant that can achieve some of the same effects as a tour. At times, users can also be effectively involved when discussions of research with strong Advisory Service linkages are planned at the site visit, or when the Advisory Service projects are being discussed. Videotapes of users on site with their comments, telephone speaker phones, or other communication techniques can bring the action to the team.

Gaining Ideas for Doing the Job Better

Some could view this objective as a sign of weakness, and it can be if conveyed through such a question as, "We don't know how to do this, can you tell us?" However, the results can be helpful if the question is focused properly: "This is a problem we are wrestling with, here are two solutions, each with advantages and weakness. Do you have suggestions useful in our decision?" Certainly that should be done only when you truly are uncertain as to the best choice.

Needs of the Team

We have treated the site visit as most educational programs undertaken by Advisory Service staff. We identified our audience, set our objectives, and considered various techniques to achieve those.

Two other considerations are important for attainment of our objectives: those objectives should be consonant with the felt needs of the audience, and the educational process should start from where they are.

Fortunately, in almost all cases the site team's needs match the Advisory Service leader's objectives rather closely. They need to:

- Grasp the situation and problems of importance to this Advisory Service program;
- Make judgments on the effectiveness of the program's Advisory Service effort;
- Make recommendations on the appropriateness of budget requests;
- Make recommendations on means for strengthening the Advisory Service effort.

Individuals on the site team will seldom begin with common understandings, even as to what Advisory Service is, much less its mode of operation in a given program. Mailing some program materials to the team members in advance of the site visit can bring more homogeneity to the level of understanding within the team. Still, the disparity in knowledge will provide dilemmas in developing a presentation.

Formal Presentation

Integration of Advisory Service presentations with those of related researchers is valuable, but a separate Advisory Service presentation is generally needed to permit team members to gain amplification and clarification of program structure and staffing. Usually involving the Advisory Service leader, the presentation itself will influence judgments on the capability of the leader. As with other presentations, crispness, good organization, and adherence to the allocated time usually lead one to feel the individual is competent. Ample time should be planned for responding to site team questions.

Restricting the presentation to one-half the total time allocated will allow for ample questions, questions often reflecting a strong need for clarification felt by the team member. Even if few questions are asked, one seldom hears concern that a presentation was too brief!

The presentation should build upon the proposal and any earlier tour, but not unnecessarily duplicate the information presented in those. The content of the presentation should not conflict with the proposal, or if it does, a clear explanation of what caused that change should be given.

I have been intrigued with the significance that site teams give to responses to their questions. Long, rambling responses are not unusual but leave very negative reactions among most site team members. Equally frustrating to the team is the person who does not answer the question asked. Frustrating the team is not one of the objectives at a site visit! Answer the question asked, not what you thought would be asked!

Who Should Make Presentations

Noting the need the site team has to judge staff competency and interaction with users, the team should have opportunity to hear from more than just the program leader. Time will permit only a few staff to be involved in group presentations, but field tours and poster sessions are other means for involving additional Advisory Service staff and permitting the site team to make better judgments. It is not always necessary, possible, or, in the view of some, desirable for all staff to meet with the site team. Sheer numbers of staff (15 or more in some states) may preclude this, and in programs with those larger numbers, additional evidence of the capability of leadership can be reflected in the staff selected to be involved in the site visit. As one example, little is gained by the site team when hearing from a person who has joined Advisory Service in just the past few months.

Advisory Service leaders, however, should recognize the important learning experience the site visit can be to staff and should seek to involve all staff members over a period of several years for that reason.

Summary

The site visit is an additional opportunity to inform and convince those making recommendations on Sea Grant funds that the institution has a strong Advisory Service. Site team members are typically committed, interested, and knowledgeable in an area important to Sea Grant, and they commit long hours to their task.

Despite the similarity of the site team's needs and those of the Advisory Service leaders, there is one crucial difference—the site team's need is to make a judgment on the Advisory Service program, the Advisory Service leader's objective is to make that a *favorable* judgment.

The suggestions above assume a strong Advisory Service program exists in an institution's Sea Grant program and that displaying it clearly will aid the program. The site visit, as the proposal, reveals more than it conceals, even if unintended. The surest way to attain the favorable judgment desired is to have an effective Advisory Service program in place.

Conclusion

The preceding material certainly is neither a complete overview nor exact directions for carrying out effective Advisory Service work. It is a collation of items developed to respond to gaps in information otherwise available to meet the pressing needs of Advisory Service workers.

These views should not be seen as hard and fast "rules" nor is it suggested that other modes of operation cannot also be effective. Rather, the views presented attempt to encapsulate experience, observation, and study in a few of the major areas critically important in the formulative years of an Advisory Service. The reader will need to adapt and alter the suggestions to his or her unique situation.

The New York State College of Agriculture and Life Sciences, a Statutory College of the State University, at Cornell University, Ithaca, New York 14853, provides equal program and employment opportunities.
Revised 9/80 FLP 1.5M 6957

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