

Role of the Subject-Matter Specialist

**Conflicts may arise as specialists attempt to comply
with incompatible demands and expectations of
state and county personnel**

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IN RECENT YEARS the concept of role has assumed a key position in the fields of sociology, social psychology, and cultural anthropology. It is now frequently used as a central term in the study of the structure and functioning of social systems, such as the Cooperative Extension Service, as well as for the explanation of individual behavior. The purpose of this paper is to analyze the role of a subject-matter specialist with the Cooperative Extension Service from a specialist's point of view. It should be recognized that our present research knowledge of the role of the specialist is inconclusive and that such an analysis will of necessity be flavored with personal experiences and observations. Particular attention is given to areas where role conflict is apparent. While most references are to agricultural specialists, a study by Harvey indicates that the same situations may apply to specialists in home economics.¹

Definition of Role

There are many ways in which role can be defined and used in the study of organizations and the behavior of individuals within organizations. The definition by Sargent seems appropriate for this paper. He defines role as "a pattern or type of social behavior which seems situationally appropriate to him in terms of the demands and

¹John J. Harvey, "A Comparative Analysis of the Functions of Specialists in the Cooperative Extension Service, by Broad Subject Areas" (unpublished Ph.D. University of Wisconsin, 1961).

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expectations of those in his group."² In this article, role refers to the behavior which the specialist feels is appropriate in view of the demands and expectations of Extension administrators and county personnel. The terms administration and administrators will be used to refer to state staff personnel whose responsibilities are primarily administrative and supervisory—personnel of the Director's office as well as district supervisors are included.

While each person in an organization occupies a role that is unique to that individual, roles usually can be grouped under a few broad categories. In Extension, for example, there are rather distinct roles for county and home agents, supervisors, and specialists. If an organization is to function effectively and efficiently, it is important that there be agreement on what is expected of individuals occupying different roles. For, as Bernard points out, a role cannot be performed alone; it must always have a counterpart.³ Thus, confusion on the part of one role performer spreads to those who are performing with him.

Lack of agreement on role expectation results in role conflict. In light of this, it has been pointed out that when an actor perceives himself in a role conflict situation in which there are two incompatible expectations (A and B), there are four alternative behaviors available by which he can resolve the conflict. He may (1) conform to expectation A (of the county agent), (2) conform to expectation B (of administration), (3) perform some compromise behavior which represents an attempt to conform in part to both expectations, or (4) attempt to avoid conforming to either expectation.⁴

Some evidence indicates a lack of agreement between specialists and related groups on role expectations. Wilkening found consensus among county agents he studied was lowest with respect to their relationships with state leaders and specialists. Agents were least satisfied with their relationships with specialists.⁵

The role of the specialist, and possible areas of role conflict, can be examined from the standpoint of (1) status, (2) norms, and (3) power and sanctions. Each of these elements will be analyzed, not

² Stansfeld Sargent, "Concepts of Role and Ego in Contemporary Psychology," *Social Psychology at the Crossroads*, eds. John H. Rohrer and Musafer Sherif (New York: Harper and Brothers, 1951), p. 360.

³ Jessie Bernard, *Social Problems at Midcentury* (New York: The Dryden Press, 1959), p. 43.

⁴ Neal Gross, Ward S. Mason, and A. W. McEachern, *Explorations in Role Analysis* (New York: John W. Wiley and Sons, Inc., 1958), p. 42.

⁵ E. A. Wilkening, *The County Extension Agent in Wisconsin—Perception of Role Definitions as Viewed by Agents*, Wisconsin Agricultural Experiment Station Research Bulletin 203 (Madison: University of Wisconsin, September, 1957), pp. 37-39.

only from the viewpoint of the specialist, but as he visualizes the expectations of administrators and county agents.

STATUS

What are some of the functions and relationships that characterize the position of a subject-matter specialist? Brown and Deekens point out that the Cooperative Extension Service does not conform to the pattern of a formal bureaucracy with a hierarchy of offices in which channels of authority are clearly defined and offices have subordinate-superordinate relationships.⁶ In general the specialist feels the administration is his "boss," but directions are also given by county staffs. In fact, it would seem that the specialist occupies a dysfunctional position, caught between the expectations of administration and county staffs, both of whom exercise authority over the specialist, but each in a somewhat different manner.

There seems to be some agreement that the most important job of the specialist should be that of training agents in a particular subject area. Yet research does not substantiate that this is the way most specialists spend the majority of their time.⁷ There are at least three possible explanations. First, it is much easier for the specialist to keep busy teaching farmers and homemakers than training agents to teach. (A couple of good talks can last all winter!) Secondly, the specialist feels more secure if the agent is less well trained and therefore dependent upon him. The third reason is that many agents have viewed the specialist as a service agent—or as a resource for literature and other material—and not as a trainer of agents.

An example of how agents' perceptions of the specialist's role affect behavior can be found in the dairy Extension section of the North Carolina Extension Service. The dairy staff has accepted agent training as their number one responsibility. Recently, however, when the staff's time-use was summarized for the year, it was found that an average of only 12 per cent of their field time had been devoted strictly to agent training. By contrast, staff members had spent an average of 34 per cent of their field time assisting or actually conducting farmer meetings. While some agent training may have been done by the specialist when he was teaching farmers,

⁶ Emory J. Brown and Albert Deekens, "Roles of the Extension Subject-Matter Specialist," *Rural Sociology*, XXIII (September, 1958), 275.

⁷ Harvey, *op. cit.*, pp. 46-76, and Carl N. Scheneman, "The Functions and Procedures of Subject-Matter Specialists in the Missouri Cooperative Extension Service" (unpublished Ph.D. dissertation, University of Wisconsin, 1959), pp. 48-

it is generally accepted that this is not an efficient method of training.

A second important function of the specialist has to do with program planning. Andrews found that both specialists and agents expect a considerable amount of assistance to be given to county program planning.⁸ The job description for specialists in North Carolina states that a primary responsibility is to assist in program planning. The specialist is described as the leader in developing and outlining a state-wide program for his respective subject and in determining emphasis and direction. Raudabaugh found in Iowa, however, that county programs were usually well planned before the services of specialists were requested.⁹ In Missouri, 59 per cent of the agents expressed a desire for more specialist help before the plan of work was developed.¹⁰ The same situation may exist in other states.

In North Carolina, specialists have generally been instructed to give priority to requests for assistance included in county plans of work. In fact, filling these requests constitutes a major portion of the program for some departments. This seems inconsistent with instructions to "develop a program within his subject-matter area and determine emphasis from year to year." The fact that specialist positions in most states are staff rather than line makes the job of developing and directing a state-wide program even more difficult. For example, suppose an agent devotes little or no time to dairying in his county, even though it may represent a sizable portion of the county's income. With no supervisory or administrative authority over county personnel and without supervisory and administrative support, the specialists' hands are almost completely tied.

NORMS FOR THE SPECIALIST'S ROLE

Specialists hold certain norms for the performance of their role; agents and administrators also hold norms for this position which are not always in agreement with those held by the specialist.¹¹ These incompatible expectations result in role conflict. For example, one generally accepted norm is that all specialist work must be

⁸ W. G. Andrews, "The Role Expectation of the Extension Subject-Matter Specialist in North Carolina as Seen by the Specialists and County Agricultural Agents" (unpublished Doctoral dissertation, Cornell University, Ithaca, N.Y., 1963).

⁹ J. Neil Raudabaugh, *Functions of Extension Specialists*, Agricultural Extension Service ST 383 (Ames: Iowa State College, 1952), p. 7.

¹⁰ Scheneman, *op. cit.*, p. 134.

¹¹ *Ibid.*, pp. 51-62.

channeled through the agent. However, this has been the cause of a great deal of anxiety and frustration in some situations, particularly where other educational or commercial interests are involved. The same situation can arise when a highly influential farmer, who does not get along with the local agent, comes directly to a specialist for assistance. The specialist, recognizing that the administration does not wish to see such an individual offended, is placed in a most difficult position. Depending upon the particular circumstances, he will take one of the alternatives previously outlined for resolving such incompatible expectations.

As specialization increases and agriculture becomes more highly technical, there may be an increasing number of instances of farmers by-passing the local agent. One who is forced by the nature of his responsibilities to be a generalist cannot also act as a technical expert in several fields. As the "stakes get bigger" the farmer is going to be content only with the latest information. Unless the specialist keeps up to date, the farmer may even by-pass him and go directly to the research worker. The practicality of the task of training county workers in all phases of technology must be faced. For example, we find few agents who, after one or two days of special training, feel competent to advise a dairyman contemplating a remodeling and expansion program that may involve an outlay of \$25,000 or more.

There are many other agencies and organizations in the field now doing intensive educational work with farmers. Personnel of many of these agencies, because of their ability to specialize in a single field, can provide real leadership in a program. In attempting to "develop a statewide program in his subject-matter field" the specialist is inclined to want to enlist the services of such people. In some counties, however, agents jealousy guard their right to the exclusive services of the specialist; they see other agency personnel as a threat to their position. Consequently, the specialist, knowing he must conform to the norm of working only through the agent, must pass up this opportunity for enlisting the help of other agency personnel in conducting his program.

In the eyes of many, county experience should be a prerequisite in assuming a position as specialist. For example, 78 per cent of Wisconsin Extension personnel felt county experience was of "much" or "very much" importance as a requisite for hiring specialists.¹² Boone found the extent of county experience among spe-

¹² Helgi H. Austman, "The Functions of Specialists in the Cooperative Extension Service in Wisconsin" (unpublished M.S. thesis, University of Wisconsin, 1957), p. 21.

cialists to be related to the type of administrative organization at the state level.¹³ In a survey of all state Extension directors, Watkins found that only 12 per cent of the states listed county experience as a requirement for specialists.¹⁴ Since the work of the specialist as outlined in most job descriptions is quite different from that of the county worker, the important factor may be certain competencies that are sometimes developed through county experience. Such competencies may be developed more efficiently through additional training in the physical, biological, and social sciences.

POWER AND SANCTIONS

As defined by Loomis and Beegle, power is control over others.¹⁵ It may result from authority or influence. Authority is viewed as the right to control the action of others, while influence is regarded as control over others in a non-authoritative way. Influence is based upon such things as skill in human relations, past favors, superior knowledge of inter-relations, and role performance. Any power the specialist might have over county personnel would fall under the heading of influence. In addition to his technical knowledge, perhaps his greatest asset in influencing action of agents and Extension administrators lies in powerful commodity and other organized groups with which he may work. Because of close working relationship (the specialist may have had a major hand in the formation of such organizations) his influence with them is likely to be greater than that of other Extension personnel.

Willingness to conform to the agents' norms for the position affects the specialist's influence. Perhaps most important of all, though, is how well he is liked by those occupying counter positions. Unfortunately, this is often more important than his technical ability. Many individual cases could be cited where a specialist, possessing great technical knowledge, was relatively ineffective because he was not accepted by agents.

There are many sanctions (rewards and penalties) that may be applied to induce compliance with the norms and objectives for a

¹³ Edgar J. Boone, "The Professional Status of Extension Specialists as Compared with Research-Resident Teaching Staffs of Selected Departments in Four Land-Grant Institutions" (unpublished Ph.D. dissertation, University of Wisconsin, 1959), pp. 85-86.

¹⁴ M. O. Watkins, "The Role of the Extension Specialist in the Land-Grant College" (unpublished Doctoral dissertation, School of Public Administration, Harvard University, 1955), pp. 229-32.

¹⁵ Charles P. Loomis and Allan J. Beegle, *Rural Sociology: The Strategy of Change* (Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1957), p. 4.

position. Administration has the effective reward of promotion and salary. Administrators often have opportunity for making new or special assignments which may carry considerable prestige. The reverse, of course, could be used as a penalty for failure to conform to norms. From time to time financial support beyond that contained in the regular budget is needed; the right to give or deny this support is a powerful sanction. Inasmuch as the specialist has no administrative or supervisory authority over agents, he is dependent upon the agent's invitation to his county. This is a most effective sanction. Furthermore, the specialist has no control over the percentage of county staff resources that will be allotted to his program; the agent can adjust, in one direction or another, this amount as a means of obtaining conformity.

There are also sanctions that the specialist can apply, but they are not as numerous or as effective. By the nature of his position, the agent can get caught in a situation where he urgently needs help; the specialist can be readily available or he can be slow in responding. New programs are usually launched on a state-wide basis after a trial period in selected counties. Being selected to participate in a pilot study is considered an honor to the county—the selection of these counties is usually in the hands of the specialist. And being a member of the state staff, the specialist may have opportunity to help evaluate the effectiveness of an agent. There are times when, because of his greater technical knowledge, the specialist actually has more influence with a particular farmer or group than the agent himself (these may be people who could be a valuable ally or a powerful foe for the agent).

SUMMARY

By use of the role concept, an effort has been made to examine the role of the subject-matter specialist, particularly in areas where conflict may exist. Such conflict is likely to occur as the specialist attempts to comply to what are often incompatible demands and expectations of state and county personnel. Even though research findings to date can not be considered conclusive, evidence indicates that the role of the specialist should be more specifically identified and clarified.

Even though the specialist is responsible to the state administration, the success of his efforts depends in great measure on how well he is received, and his services utilized, by county staffs. To be in the good graces of county personnel he may find his energies being expended in a direction not altogether in keeping with how he

thinks his competence can be most effectively utilized. Research findings reveal that county staff requests for specialist assistance do not always conform to what they say the specialist role should be.

At the same time, the specialist may find himself hard pressed to reconcile the actual use of his time with what is set forth in his job description. Part of the discrepancy may be related to traditional norms held for the specialist role (e.g., that he functions only at request of county personnel). Administrators and county personnel have at their disposal certain sanctions (rewards and penalties) that can be used effectively in keeping the specialist "in line"; less potent sanctions may also be available to the specialist.

This examination of the role of the specialist from the standpoint of status, norms, and power and sanctions has approached the subject on the assumption that all specialist positions can be examined from the same point of view, as has been the case for most of the research conducted to date. However, some research evidence suggests that differences exist in expectations held by and for specialists, depending on the administrative organization at the state level and on the more specific nature of the specialists' responsibilities. Perhaps future studies should take such possibilities into account—perhaps it may be that all specialists under all circumstances should not be expected to function in the same manner and through the same channels. It should also be pointed out that studies conducted to date have been perception and opinion studies, examining the role of the specialist from the standpoint of how Extension personnel see it. No research reported here has attempted to measure specialist effectiveness.