

**ADVISORY SERVICES IN TRANSITION: THE CHALLENGE OF CHANGE****Pat Bogue**

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**Abstract**

*Extension services must continually adapt to the changing agricultural environment and to changes in farm family circumstances in order to remain relevant. Change is difficult to implement particularly for large scale public sector extension agencies. The Irish public sector extension agency, Teagasc, developed a new and dynamic advisory programme 'The Opportunities for Farm Families Programme' in an effort to support farm families in adjusting to their changing agricultural environment, particularly to reforms in the Common Agricultural Policy. The purpose of this paper is to outline the key challenges faced by Teagasc in introducing this new advisory programme and approach to the delivery of advice. These challenges included: convincing staff of the new approach and achieving 'buy-in'; identifying and clarifying misconceptions about the programme; adapting as an organisation to selling a programme where there is not farmer led demand (but there is a need); changing the nature of the provision of advice from reactive to proactive; prioritising and managing workload; and managing and achieving programme targets. The process and the approach used in the implementation of the programme need as much focus as the actual programme or product around which the change is centred. Getting the vision right is only part of the challenge, effectively communicating that vision within the organisation is critical. Change is ongoing and inevitable but to be sustainable, it is important that it is approached and managed positively (encouraged and supported) rather than negatively (forced and imposed).*

**Introduction and Background**

Agricultural extension systems have played an important role in the shaping of modern agriculture and in particular on the practices of farm families. Successful extension services continuously adapt to changes in the agricultural environment and the needs of farm families (clients). Extension services are agents of change and must change themselves if they are to survive, be relevant and provide value for money (Carey, 2004). Teagasc is the public sector agency, which provides advisory, training and research services to the agriculture and food industry in the Republic of Ireland. This paper sets out the challenges faced by Teagasc in the introduction of a new advisory programme – the Planning Post Fischler Programme.

*The Need for Change in Extension*

Despite their success in the development of agriculture and farm systems, extension agencies need to continually assess the services they are providing and how these contribute to

the agency's overall mission/goals. One of the challenges for extension agencies is to remain relevant to farmers in an ever-changing environment. Swanson et al. (2002) state that the main task of a public extension system should be human resource development that can equip medium and small-scale farmers to solve their own problems and respond to new opportunities. However, extension has very often become prescriptive, extension agent believing that they know what is best and fails to focus sufficiently on the client's needs (Tucker, 2000). This shift in extension cannot be blamed totally on the extension agent, farmers have come to expect a definite recommendation from their advisor (van den Ban, 1999). It has been proven that people adjust to change more rapidly when they themselves initiate, identify and solve problems that directly affect their welfare (Cohen and Uphoff, 1980 as cited in Duvel, 1995).

Most developing country extension systems pursue some combination of human resource development and technology transfer programmes (Nagel, 1997). However, many extension systems concentrate their efforts on technology transfer. Swanson et al. (2002) highlighted that public extension has not been effective in responding to the basic education and technology needs of small-scale farmers. Many farmers have little contact with the advisory service and become increasingly marginalized. In developing countries, the extension service aims to reach the wider farm family (men and women) however, as agriculture develops, the advisory contact focuses on the main operator (predominantly the man). Therefore, there is a need for advisory services to reconnect with other family members. While the need to reconnect many farm families to the advisory service was recognised both within and without Teagasc, it was difficult for the organisation to provide an effective viability service to farmers under income pressure due to financial and staffing pressures combined with farmer demand for technical information and support in obtaining direct payments (Phelan, 1998).

Many extension services have recognised the need to make a greater effort to reach those farmers most in need of agricultural information but who are often overlooked. These changes are not easy for the agencies as they mean moving out of the areas that advisers are most familiar with (technical advice) and into areas where they must provide a severe challenge to farm families to explore their options (both on and off-farm). Agricultural development demands painful changes in the way of farming and of living for many farm families. It is a challenge for extension agencies to help farm families realise this (Van den Ban, 1999).

#### *Opportunities For Farm Families Programme/Planning Post Fischler Programme*

The terms Opportunities for Farm Families Programme (OFFP) and Planning Post Fischler Programme (PPFP) are used interchangeably in this paper. The OFFP was the name of the programme from 2001-2003, the programme was re-launched as the PPFP in 2004 and renamed as the Options for Farm Families Programme after this research project was completed).

The challenge to refocus the services provided to farm families was recognised by Teagasc by way of the introduction of the Opportunities for Farm Families Programme (re-launched as the Planning Post Fischler Programme and subsequently as the Options for Farm Families Programme). The mission statement of the Opportunities for Farm Families Programme was: "... to proactively encourage, stimulate and support farm families in building the capacity of the farm household to achieve and sustain viability" (Teagasc, 2003). The fundamental objective of the programme was to help farm families generate additional household income (explore new opportunities both on and off farm) and to improve their quality of life. A further objective of the programme was to change the method of delivery of advice to farm families by providing training to help advisers. Particular emphasis was placed on connecting with those

who had limited contact with the advisory service and on engaging other family members. The emphasis within the programme was the identification of priority issues and the exploration of future options through a process of interactive discussion rather than the provision of prescriptive solutions.

The programme, which involves three stages, is available to all farm families and free to farm families with less than 150 income units (270,000 litres of milk quota, 150 beef cattle, 900 sheep, 150 hectares cereals or equivalent). Stage 1 involves viability appraisal in which the farm family identifies their main household viability concerns and explores possible future options (on-farm and off-farm). This stage is delivered by way of two facilitated group discussion meetings. Families are guided through worksheets, which explore their concerns, establish their financial situation and identify possible options. Stage 2 involves options analysis leading to the development of a 'Way Forward Action Plan', which sets out clear actions for the future. Specific measures to generate additional income and/or improve quality of life are identified by the family in conjunction with an adviser. Specific advice and training needs of the family are also identified and appropriate referrals made to other relevant agencies. In Stage 3 the farm family implements the actions specified in the 'Way Forward Action Plan'. Advisory support is provided to the family during this period.

### **Purpose**

The purpose of this paper is to outline the challenges faced by Teagasc in refocusing its advisory programmes to better meet the needs of farm families. The introduction of a new programme is rarely a smooth operation, there are usually some problems or difficulties. The 'Opportunities for Farm Families /Planning Post Fischler Programme' was no different. Some of the key challenges, which emerged, and how the organisation responded to these challenges are outlined in this paper which may serve as a guide to other advisory/extension organisations in undertaking similar activities.

### **Research Methods**

This paper draws on the findings on a three year action research programme on the 'Opportunities for Farm Families Programme'. The research programme was a collaborative project between Teagasc and the Department of Agribusiness, Extension and Rural Development, UCD. The primary aim of the research was to inform the development of the 'Opportunities for Farm Families Programme'. The secondary aim was to measure the impact of the programme on farm families. Over the three-year time-span of the project, a variety of research methods and approaches were used (drawing on national and international research and experience). Some of key methods employed included:

- Face-to-face surveys with programme participants (farm families);
- Face-to-face, telephone and e-mail surveys of programme advisers and co-ordinators;
- Telephone surveys with non-farm families (comparative study on quality of life);
- Elite interviews with Teagasc managers;
- Focus group meetings with programme advisers, specialists and managers;
- Case studies of farm families; and
- Observation of programme delivery.

Research findings were utilized: by management and staff in the development of the programme; in-service training for staff; and in various publications and support material relating to the programme.

## Results

The core of this paper is about exploring challenges faced by Teagasc as an organisation in implementing a new advisory programme and approach to delivery. This programme involved significant change for the organisation and even the programme itself has undergone change in its relatively short history, originally the 'Opportunities for Farm Families Programme', subsequently the 'Planning Post Fischler Programme' and currently the 'Options for Farm Families Programme'. This paper draws on the findings of a 3-year action research project.

As the project was nearing completion, Teagasc managers were involved in a reflective process on the management of change in the overall organisation. One of the approaches they focussed on was that described by Kotter and Cohen (2002). The change process as identified by Kotter and Cohen, while focused on an overall process within an organisation and not just the change involved in introducing one new programme, it provides a useful structure for examining the introduction of the Planning Post Fischler Programme. Kotter and Cohen (2002) describe the change process in an organisation as involving eight distinct steps: Increase Urgency; Build a Guiding Team; Get the Vision Right; Communicate for Buy-in; Empower Action; Create Short-Term Wins; Don't Let up; and Make Change Stick.

### *Step 1: Increase Urgency*

Raising a feeling of urgency is the first and most critical step in a successful change effort, shock people into understanding the need for change and 'get people out of the bunker' Kotter and Cohen (2002). Teagasc management recognised that the changing farming environment was challenging farm families to make adjustments, which many were finding it difficult to cope with or needed support in meeting these challenges. Management successfully recognised the urgency by developing a new and dynamic advisory programme 'The Opportunities for Farm Families Programme' (subsequently the 'Planning Post Fischler Programme').

However, there was reluctance among some advisers to get involved in the programme were not convinced about the programme (Bogue, 2003). In 2005, only 42% of programme coordinators believed that the majority of staff had bought into the concept and ethos of the programme and over half (54.5%) identified that staff buy-in was one of the greatest problems facing the programme (Table 1).

**Table 1. Main Constraints/Problems Facing the Planning Post Fischler Programme Identified by Coordinators (n=22)**

<b>Constraint</b>	<b>No.</b>	<b>%</b>
Staff Workload/Prioritisation of Workload	21	95.5
Way Forward Action Plan	16	72.7
Programme Integration	15	68.1
Adviser Buy-in/Belief	12	54.5
Lack of a Programme Identity	10	45.5

There was also a difficulty convincing farm families that the programme was important for them and could be a real benefit to them in securing their future. Farm families were not actively seeking the programme and needed to be convinced. Teagasc as an organisation needed to adapt to selling a programme when there is not a farmer led demand (there was a need) and develop the

approach of selling the programme to farm families (Bogue, 2003). Advisers needed to convince families that this programme had something to offer them and that they should participate.

In order to increase the urgency, Teagasc and the Government agreed an overall target of 20,000 farmers participating in the programme (2001-2006) and individual targets were set for each county. The setting of targets was both positive and negative. It was positive in that it focussed on the task in hand and allowed for proper planning (i.e. increased the urgency). It was negative in that some viewed it as a further imposition on their already busy workload. While targets are a necessary management tool, they can lead to a focus on quantity and not on quality (Bogue, 2005b).

### *Step 2: Build the Guiding Team*

Every good change initiative needs influential, effective leaders to drive the process. It is important to get the right people in place who are fully committed to the change initiative, well respected within the organisation, and have power and influence to drive the change effort at their levels (Kotter and Cohen, 2002). One of the challenges in building the guiding team is to ensure that key people are willing to make change. The introduction of the 'Opportunities for Farm Families Programme' required a change in attitude and in the approach to the delivery of advisory services. The programme was new and required a new approach. One of the problems for Teagasc management in guiding a new programme is aptly summed up by de Vries (as cited in Kotter and Cohen, 2002) '*I have people who want everything on their terms. They want the new vision to be their old vision*'. Many believed in Teagasc that the 'new' programme should be delivered as 'other' programmes were in the past and made to fit into old structures. The programme team highlighted the importance of the new approach and many advisers, Coordinators and Area Managers championed the new approach. Possibly the programme leaders should also have been as direct as de Vries (2002) when asked to merge the old elements '*I have no intention of doing that. It does not make sense to me. It is wrong. And I will not do it.*' Despite the commitment of management to the programmes, one fifth of programme coordinators identified a lack of direction and motivation from management as a serious problem facing the programme (Bogue, 2005).

One of the initial weaknesses of the programme was the level of involvement of the informal leaders within Teagasc. Programme specialists support advisers in their roles. In practice, advisers are significantly guided and influenced by specialists for their particular area – e.g. a dairy specialist will guide a dairy adviser in their work. By way of their credibility with advisers, ongoing working relationships and experience in their field, specialists exert considerable influence over the work programme of advisers even though they are not involved in the advisory management chain - they have no direct command over advisers. While the organisation informed the specialist teams about the programme and the specialists accepted the programme, the 'where' and the 'how' this programme fitted into their individual programmes were not adequately addressed. This issue of programme integration was subsequently addressed by Teagasc.

### *Step 3: Get the Vision Right*

While creating a shared need and urgency for change may push people into action, it is the vision that will steer them into the new direction (Kotter and Cohen, 2002). The new approach developed by Teagasc was endorsed by the families who participated, who agreed that

the programme was achieving its objectives. The success of the programme concept, approach and content is evident by the fact that the programme is well received by those farm families who have participated (Bogue, 2005).

Research has shown that participants considered the programme to be very worthwhile and beneficial to them: 73% considered that the programme was helping them take a realistic look at their current situation and 76% considered it some or a significant benefit to them (Table 2).

**Table 2. Views of Participants on How the Planning Post Fischler Programme can help them (n=200)**

Aspect	Yes	No	Possibly
	(%)		
<b>Take a realistic look at situation</b>	72.5	8.5	19
<b>Improve household income</b>	24.5	58	17.5
<b>Improve quality of life</b>	39.5	45	15.5
<b>Identify best measures post CAP reform</b>	50.5	21.5	28

Some 85% of advisers were certain that the programme could help farm families to take a realistic look at their situation and 63% of advisers were certain that participation in the programme would help farm families identify the best farm system for the future (Bogue, 2004). Therefore the vision of a programme, which supported farm families in planning their future and addressing issues relating to income and quality of life, was right. However, the difficulty was in getting all to share that vision. There were also misconceptions about the vision. Initially it was perceived by staff in some of the more commercial farming areas as not being for them, as it was too lightweight - not dealing with technical issues for technical farmers. In other areas, it was perceived as being for those in financial difficulties and 'in trouble'.

However, there were also further problems relating to the vision. Many advisers did not believe that quality of life was a priority issue for farm families (income was perceived to be much more important) or that they had the skills to address it. In reality quality of life is probably not the priority issue that any farmer will want to engage with their Teagasc adviser, the contact will be made with regard to a technical issue. However, in the course of dealing with these technical and practical issues, it would be surprising if farmers did not raise quality of life issues with their adviser. Advisers might disagree but it is unlikely that any adviser has not come across some of the following comments in their discussions with farmers:

*I am too busy; I will probably be the last one to farm this land; I'd love to be able to take a break; I/we need a job; the income is dropping but the cost of running the house is increasing.*

All these comments relate to the quality of life of farm families and therefore advisers have more dealings with the quality of life of farm families than any other profession. Advisers are therefore in a position to positively influence the quality of life of farm families. The challenge once more for the organisation was to convince the staff of its vision and of its belief in the staff to deliver on this vision. The reality from research on the programme was that the issue that many families addressed was quality of life rather than income (Bogue, 2005a).

The programme also had the vision of 'proactively encouraging, stimulating and supporting farm families'. Therefore the aim of the programme was that the organisation would initiate

change in farm families and seek them out, yet this was one of the aspects of the programme, which was cited by advisers as causing the most problems. The challenge for Teagasc was to become proactive again after a period of being reactive. Teagasc was successful in becoming proactive in the sense that it has to date delivered the programme to 12,000 participants, reaching a cross-section of the farm population (both clients and non-clients) (Bogue, 2004).

#### *Step 4: Communicate for Buy-in*

Once a vision and strategy have been developed, they must be communicated within the organisation in order to gain understanding and buy-in. Sending clear, credible and heartfelt messages about the direction of change established genuine gut-level buy-in, which sets the stage for the next step – getting people to act (Kotter and Cohen, 2002). Teagasc management believed that they had a good product to deliver to farm families and have been proven correct in this by the response of farm families. Participants have consistently complimented the programme in terms of both the approach and content. However, management also believed that the value of the programme would be recognised within the organisation. The majority of the communication effort was focused on conveying the details of the programme ‘nuts and bolts’ to the staff on the ground (advisers) and not enough on convincing them and all managers of the importance and significance of the programme and getting them to ‘buy-into’ the concept and ethos of the programme. Communication is a two-way process and management have some lessons to learn from staff. Many advisers were uncomfortable with delivering the non-farm and non-technical aspects of the programme and needed support in these areas. Teagasc have now tackled this issue of internal marketing by way of an external specialist who is working with staff at all levels to convince them of the concept and ethos of the programme and secure a greater buy-in. Teagasc have also undertaken a major external promotion campaign to promote the programme to farm families and create a distinct programme identity.

#### *Step 5: Empower Action*

Kotter and Cohen (2002) describe this step as about empowering a broad base of people to take action. Rather than viewing empowerment as handing out power, it should be seen as removing barriers to those whom we want to assist in pushing the change effort. From the perception of advisers, this was the area where management had the greatest difficulty in the implementation of the programme (removing barriers to implementation e.g. workload). Some 94% of area managers identified workload and prioritisation of work as the main problem with the programme (Bogue, 2005). This programme was additional to existing work and advisers were already stretched to their limits. However, advisers had in fact the power to take action on the programme, each adviser had a target number of participants to bring through the programme in addition to their financial target to be collected from farm families. It was then up to the adviser to prioritise their time to meet both targets. Many advisers successfully achieved both targets while others had difficulty.

Organisations such as Teagasc need to pay particular attention to the issue of work prioritisation. Teagasc has a number of priority programmes but priorities at management level are not always translated into priorities at implementation level i.e. advisers may have different priorities. In theory the programme is important and appropriate but this is not evident to everyone on the ground. To succeed, the programme needs to become a priority at all levels within the organisation (Bogue, 2005). It is important to realise that advisers are responding in many cases to the immediate needs of their clients (reactive). The client-adviser relationship has

been build up over a long period in many cases and therefore advisers feel obliged to respond to the clients needs. By nature of being reactive the adviser has less control over the link with the client. Teagasc may need to commit more effort to ensuring that advisers are able to take on the organisations' priorities. The organisation must ensure that its advisers on the ground are capable (in terms of time) of delivering to its corporate targets.

*Step 6: Create Short-Term Wins*

Short-term wins nourish faith in the change effort, emotionally reward the hard workers, keep the critics at bay, and build momentum. By creating short-term wins, progress is achieved and people are inspired (Kotter and Cohen, 2002). The main challenge is to produce enough short-term wins fast enough to energise the change helpers, enlighten the pessimists, defuse the cynics, and build momentum. One of the difficulties that all public sector advisory services face (not just Teagasc) is the ability to provide incentives or rewards for staff who deliver to the targets set out for them. There is no method of rewarding staff that embrace a new approach and deliver to their targets and above. Equally there are no sanctions for those who refuse to adopt a new approach or do so with little enthusiasm. For those who were achieving their targets, it seemed that they had only achieved one year's target, when the next was upon them. There were a number of short-term wins in this programme: it was proven to be successful in a number of counties – total buy-in and active involvement; the programme was proven to achieve its objectives of improving income and/or quality of life (or potentially improve); many advisers believe it has the potential to improve income and quality of life; and the content was proven to be correct by both advisers and participants. However, the pressure of workload and targets, meant that the short-term wins were not evident to all and not celebrated as successes for the programme.

*Step 7: Don't Let Up*

You are not done until the change has been entrenched in the very fibre of the organisation (Kotter and Cohen, 2002). One of the key factors in influencing change is that '*you need to be willing to challenge the status quo ... willing to challenge ... instead of just accepting that something is set in stone because it's always been done that way*' (Nolan and Featherstone as cited in Kotter and Cohen, 2002). Despite the challenges encountered in developing and implementing this new programme, Teagasc have not let up. They have continued to develop and refocus the programme in response to concerns of staff and participants. The programme continues to reach and benefit an increasing number of farm families.

*Step 8: Make Change Stick*

Frequently, leaps into the future slide back into the past when the new behaviour does not become tradition, the typical way 'things get done around here' (Kotter and Cohen, 2002). Teagasc have shown a commitment to the programme and the process by investing in its development and by committing the organisation to similar programmes and processes in the future.

### **Conclusions and Implications**

Advisory agencies need to continually adjust in order to provide innovative solutions to their clients but also to remain relevant. Often this change can take the form of a gradual adjustment in practices, technologies and approach, however the change involved in this

programme was a radical shift in both the approach and method of delivery of advisory services. As a result Teagasc faced many challenges in the introduction of the Planning Post Fischler Programme. This paper has sought to identify these challenges and the level of the success Teagasc has had in meeting them. Despite the difficulty encountered, the reaction of participants to the programme confirmed that Teagasc got the vision right. However, communicating the vision is very important – a lack of a full understanding of the vision can lead to problems and misconceptions. The vision must be fully communicated and understood by all staff. While the vision may be right, organisations must not underestimate the challenge of implementing that vision. Management also needs to clearly communicate to all staff what it wants to achieve. There must be no gaps between what is actually aimed to be achieved and the understanding about what is aimed to be achieved.

Without any doubt, it is difficult to change the approach to extension/delivery of advice because it involves changing the attitudes and opinions of people (advisers/extension agents) who have their own view on how the agency should develop. Over a number of decades farm advice evolved from a proactive to a reactive service (responsive to the demands of clients). While in general this was not a negative development – it moved away from the ‘we know what is best for you’ attitude. However, clients can become focussed on short-term issues to the detriment of long-term planning. While this programme was proven to be a benefit to farm families, this was not immediately obvious to families and the programme had to be sold to them. Organisations such as Teagasc must adjust to selling a programme. All staff need to be convinced about the value, benefit and importance of the programme before any attempt is made to sell it to farm families/clients. Management at all levels must believe in the ‘concept and ethos of the programme’ and work as a team to convince all members of the value of the programme. The actions of management in this regard speak a lot louder than their words. Staff at all levels need to commit to giving a new programme a try.

It is evident from the experience of the Planning Post Fischler Programme that training must be provided on building the ‘belief in the concept and ethos’ of the programme in addition to on ‘the how and the what’. New programmes must be marketed within the organisation before external marketing to clients/potential clients. It must not be assumed that a good product alone will secure staff ‘buy-in’. The programme mechanics are worthless if there is no belief.

Targets are a necessary management tool and a method of both encouraging and monitoring/measuring performance, however, they need to be used sensitively so that they do not lead to dissent or a focus on quantity to the detriment of quality. Effort must also be placed on convincing the clients about a new programme and getting them to demand the service – push and pull factors – pushing from management and pulling from clients.

Leadership, both formal and informal, plays a key role in successfully implementing change. The lesson learned from this programme is that greater effort needs to be placed on getting the local managers (formal leaders) to fully support and prioritise the programme and the specialists (informal leaders) to integrate the programme into the overall advisory strategy and ongoing programmes.

A programme identity is the brand by which a programme is known. It is particularly important when an awareness and demand needs to be created among the client base (farm families). Advisory services must sell a programme by its name and benefits to clients/potential clients. A strong programme identity leads to more farmer-to-farmer selling of the programme. In creating an identity, it must appeal to all its target audience – in this case farm families, spouses and successors in addition to farm operators.

Barriers to implementation must be identified and addressed. Existing workload will always be an obvious barrier and must be carefully considered. The following questions need to be asked: What is the existing workload? How will the new programme impact on workload? What is the labour demand of the new programme? What is the level of priority of the new programme? Existing workload must not be the factor, which hampers the introduction of a new advisory programme. It is important that the perceived and actual level of priority are the same, if not problems will arise. Organisational priorities need to be accepted and agreed by all staff and enforced. Prior to the introduction of a new programme management needs to examine the existing workload of staff and the real prioritisation of workload. 'Real' means the actual priority a programme gets in the weekly schedule of advisors not the level of prioritisation that management perceives. If a workload is already excessive, it is going to be very difficult to successfully encourage someone to add to that workload. The 'excuse' of workload needs to be removed – either it is a real problem and is dealt with by the organisation or it is determined not to be a real problem.

The successes of programmes need to be celebrated in order to encourage the further uptake and implementation of that programme. Public sector services cannot provide direct incentives (or indeed sanctions) but systems need to be developed and put in place for those who achieve their targets and successfully implement the organisational priorities. Those who deliver must be rewarded and non-delivery discouraged.

Overall, Teagasc have succeeded in developing and implementing a new family focused advisory service. There have been major challenges in the implementation of this programme, some of which have been successfully dealt with while others remain. The real success is that the programme was well received by the target group.

The key lesson to be learned from the Teagasc experience of implementing a new advisory programme is that there are enormous challenges to be faced in 'implementing and managing change'. The process and the approach used in the implementation need as much focus as the actual programme or product around which the change is centred. Getting the vision right is only part of the challenge, effectively communicating that vision within the organisation is critical. Change is ongoing and inevitable but to be sustainable, it is important that it is approached and managed positively (encouraged and supported) rather than negatively (forced and imposed).

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