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A Case Study on Marketing the Florida Cooperative Extension Service

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A Case Study on Marketing the Florida Cooperative Extension Service

Abstract

This case study focuses on the development of future marketing opportunities for the Florida Cooperative Extension Service, as seen from the possible perspective of IFAS Administrative personnel. The case study focuses attention on the current activities and impacts of IFAS/Extension, as well as future program focus areas, and uses that information to develop a marketing plan for growth and public recognition. The data included for student analysis come directly from IFAS reports and publications. The accompanying teaching notes are provided to assist readers/users in drawing conclusions based on the data and information presented.

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This teaching case study is appropriate for use in an introductory marketing management course but can also be used as a tool in an Extension administration or public administration course. It is unusual as a case study in that it deals with a public educational institution versus a commercial/private organization's business or offering. Through this case study, students will become familiar with strategic planning efforts, the processes used in developing these plans, and the need for accurately measuring the effectiveness of these plans.

Students analyzing the information and data provided can be asked to make decisions on the effectiveness of the marketing effort used by UF/IFAS, determine the scope of the programs provided by the University of Florida's Cooperative Extension Service, and choose an option for the future of Extension marketing and programming. Data provided shows discrepancies between the reach IFAS leaders feel Extension marketing is having and the actual number of participants in the programs. A comprehensive set of teaching notes is available, upon request, from the second author.

Case Study Scenario--The Florida Cooperative Extension Service Marketing Problem

Dr. Mike Martin sits at his desk at the University of Florida (UF). As UF's Vice President of Agriculture and Natural Resources, he's had to make some tough decisions lately that have had significant impacts on UF staff and programming all over Florida. Budget cuts have forced the closing of two major Research and Education facilities, and changes to the Extension program are forthcoming. As he mulls over comments made at a recent Advisory meeting, he considers the Florida FIRST marketing initiative he implemented 3 years ago--an initiative that was intended to make the public aware of the benefits and services offered by Extension and the Institute of Food and Agricultural Services (IFAS), thus creating a demand for their programs and making budget cuts in this area more politically unpalatable. Dr. Martin knows that Extension has often been referred to as "the best kept secret in county government." What can he do to get the secret out?

Authors' Note: Michael Martin is currently the President of New Mexico State University.

Background Information for the Case Study Analysis--The History and Purpose of IFAS/Extension

The University of Florida has many claims to fame and notoriety, but it holds one title that most have never heard about--it's a land-grant university. Land grant universities were established under the provisions of the first and second U.S. Morrill Land-Grant College Acts in 1862 and 1890-- laws meant to "promote the liberal and practical education of the industrial classes in the several pursuits and professions in life" by establishing colleges to teach "such branches of learning as are related to agriculture and the mechanic arts." These laws were strengthened in 1887, when Congress established agricultural experiment stations, and again on May 14, 1914, when President Woodrow Wilson signed the Smith-Lever Act establishing Cooperative Extension Services and specifying that they be associated with a land grant college. Federal funds would be matched by state and local funds, and used to support experiment stations and Extension offices, all operating under the auspices of the land-grant university in that state.

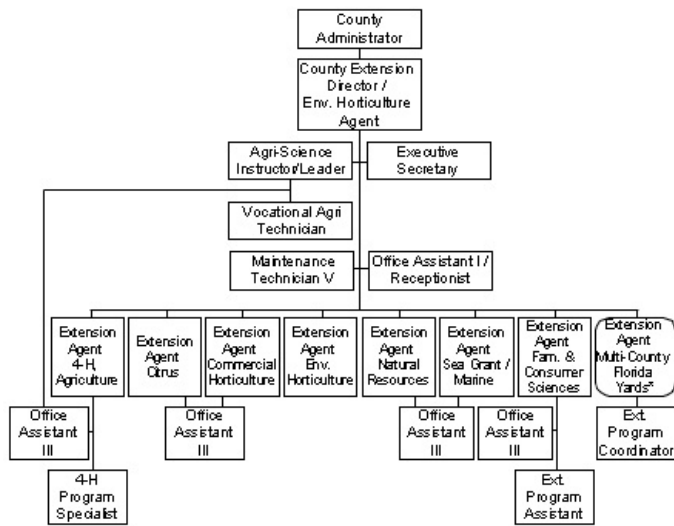
The UF/IFAS is a federal, state, and local government partnership dedicated to education, research, and Extension, a result of the University of Florida's designation as a land grant university. Operating as part of IFAS, Extension serves each of the state's 67 counties by providing information and conducting educational programs on issues such as sustainable agriculture, competitiveness in world markets, natural resource conservation, energy conservation, food safety, child and family development, consumer credit counseling, and youth development. These subject areas are very broad, allowing UF/IFAS staff to focus their efforts on more specific facets of these areas.

The IFAS/Cooperative Extension Service in Florida has evolved over time to become a county-based program. A majority of the funding for Extension comes from the individual county governments. County Extension offices are usually located closer to rural areas of a county rather than clustered with other county offices. There are more than 67 Extension offices now serving the state of Florida.

In general, each office will house two or more Extension agents, who may be fully university funded, fully county funded, or funded by a combination of sources. The subject areas of the agents in that county are based on the agriculture industries found in the area. For instance, Okeechobee County's economy is largely supported by the dairy industry, so one of the agents working at the Okeechobee Extension Office is a Dairy/Water Quality Agent. The nearby counties that are more economically supported by the citrus industry have a multi-county commercial citrus agent to rely upon. Most counties in the state, but certainly not all, have one or more horticulture agents in their Extension office. Some counties have enough staff to be able to provide their communities with a Homeowner Horticulture Agent, Commercial Horticulture Agent, and an Environmental Horticulture Agent. Almost every county in the state supports a 4-H Agent, who may also have a combined focus, such as 4-H/ Agriculture or 4-H/ Family and Consumer Sciences.

Across the state there are agents who focus on dairy cattle, beef cattle, natural resources, energy and housing, marine sciences, water quality, and more. Extension agents' programs are often delivered by Program Assistants, who are usually supported by county funds, as are the clerical support and office manager positions in the counties. Figure 1 shows an organizational chart from a typical county Extension office, the St. Lucie County office. In addition to the permanent staff, there are almost 300 4-H volunteers and 82 Master Gardener volunteers working at the St. Lucie County Extension office.

Figure 1.
Organizational Chart from St. Lucie County Extension FY2002-03



IFAS and Extension are made possible because of the cooperative efforts of many contributing organizations. Each of these entities is recognized for its participation on every IFAS document that is distributed to the public. Along with that, agents and county support staff are instructed to include identification on created documents for all contributing organizations, whether they are outside sources, departments or programs within IFAS. Figure 2 shows examples of some of the logos that may be included on a program announcement. Figure 2 does not show the different county logos that could also be included, because there are too many to depict in this document, but it is important that county support be recognized. Because the effects of image marketing--and therefore branding--build over time, consistency is critical. Every piece of communication should support the brand and be consistent over time (Maddy & Kealy, 1998).

Figure 2.
Examples of UF, IFAS, and Extension Program Logos



Process UF Has Already Been Through to Identify Focus Areas and Branding--UF/IFAS Extension Product Analysis

The product provided by IFAS/Extension is non-biased, research-based information that county residents are invited to use to make sound decisions regarding natural resources, human resources, and agriculture issues. The depth of the information is often staggering to those unfamiliar with Extension. From calibrating a micro-irrigation system, to building a bat house, to learning about food safety, to obtaining a pesticide license, to raising a healthy dairy cow, it doesn't seem to stop. The price for Extension materials is unbeatable--almost everything is free. If a program has an associated charge, it can only be an amount sufficient to cover the cost of offering the program, such as handout duplication or payment for a guest speaker's travel expenses, or any provided refreshments.

Strengths and Weaknesses of UF/IFAS Extension

IFAS/Extension's strength lies in its resources--the information Extension provides via publications, programs, and individual consultations; the human resources that deliver the information; and the support of community leaders and decision makers to ensure the continuation of Extension programming. It's also a result of the growing value of information. Extension information is reliable, non-biased, researched-based and has the backing of the prestigious University of Florida. In many areas of programming, Extension is seen as the sole information source or clear leader. These areas include the 4-H Youth Leadership program, Pesticide Applicator Certification program, commercial producer education, and landscape management education.

Extension agents strive to be viewed as the authorities in their fields by the community; the public's trust and reliance are very important to agents and the future of Extension. They work hard to develop programs that are informative and interesting, using resources provided by research faculty and Extension specialists.

Unfortunately, agents are fighting an uphill battle with recognition. A recent random telephone survey by IFAS suggested that Floridians have low awareness of UF/IFAS and its major sub-units and the association between UF and local Extension programs appears tenuous (Breeze & Poucher, 1999).

Alternately, IFAS/Extension's weaknesses can be seen in its slow reaction to changing community needs. Agents need to be aware of the changing population and demographics in Florida and offer programs accordingly. Programs that are outdated but still offered to low numbers of participants are costly, a waste of an agent's limited time, and provide a false impression about the need for Extension programming. It reduces the impact of agents' efforts. In conjunction with that, agents who cannot establish themselves as their community's leading authority, or become known for providing uninteresting programs, can also be detrimental to the overall Extension program.

Extension Agents are asked to track several statistical data points throughout the fiscal year and report their impacts annually in a Report of Accomplishment (ROA). They keep records on the number of programs they offer and the number of participants at those programs, as well the number of fact sheets they distribute, how often they use mass media, and how many clients they assist, whether at the office or on a site visit.

Agents are also required to submit an annual Plan of Work (POW) outlining the focus of their next year's programming efforts. Agents are evaluated on the measurability of their goals and objectives, as well as their intended program impact, and number of participants who indicate they will change their practices based on information they gained. Agents receive instruction on Affirmative Action guidelines and requirements, and must report annually on their efforts to include minority participation in their programs.

UF staff in Gainesville compile data from agents' annual ROA's to develop statewide statistics on Extension participation (see Table 1). Programmatic impacts are measured, and this information is used to determine the need for certain programs. Given that Florida's state population in 2000 was over 15.4 million, the corresponding year's statistics indicate that only a very small percentage of state residents were participating in Extension programs, especially since many participants take part in multiple programs.

In reviewing the annual data reports, one must realize that, due to the way that contacts and impacts are recorded, one person's contact with Extension can represent many data points in the report. For example, a gentleman enters an Extension office with a question about his landscape. Before that person leaves the office, the Master Gardeners and each agent who speaks with him will count him as a contact, and each publication he is given will be counted as a publication distributed. A class of 30 participants becomes 60 contacts after the second day. A 5-day, 4-H summer camp with 15 participants will become 75 contacts by the end of the week, and even more if other agents provided a segment during the program. This method of reporting can lead to misleading numbers on which to measure demand for services, but impressive numbers on which to request state and county funding.

The Florida FIRST Program

Dr. Mike Martin has been spearheading a strategic plan called "Focusing IFAS Resources on Solutions for Tomorrow" (FIRST) since 1998. He has stated that "at the time of implementation, the plan was intended as a road map for growth, but because of the economic changes felt throughout the state over the last three years, the plan has now become a road map for protection." Dr. Martin is aware that not everyone likes Florida FIRST, but he's adamant that there has to be some method of measuring effectiveness and accountability.

In developing the Florida FIRST program, stakeholders across the state identified areas of importance on which they felt IFAS should focus. Studies had shown that a booming economy had triggered an impressive growth in the Florida labor market in the past 20 years and that Florida's overall population was expected to grow to more than 20 million people by 2025, a 33% increase compared to projections for the year 2000. The population explosion triggered growing concern in the state over land use, and conflicts between rural and urban development. The impacts on natural resources, especially water, were also recognized. Stated objectives for IFAS/Extension programming efforts were developed that included:

- Evaluations of the relevance of various parts of the UF/IFAS program-delivery system,
- Increased collaboration with other public and private agencies and institutions to reduce duplication of programmatic efforts throughout the UF/IFAS organization,
- Improved coordination of UF/IFAS programs statewide,
- Development of an expanded stakeholder base,
- Formation of a broad-based advisory panel,
- Increased conversation to evaluate the Florida FIRST effort with individuals and organizations at the grass-roots level, and
- Enhanced public awareness of the UF/IFAS brand among stakeholders and the general public.

Table 1.

IFAS/Extension Activities and Impacts for 1999 and 2000, Statewide and Selected Counties
(Click the table for a larger version.)

	IFAS/Extension Activities and Impacts for 1999 & 2000, Statewide and Selected Counties											
	Statewide			Alachua			Monroe			St. Lucie		
	1999	2000	% change	1999	2000	% change	1999	2000	% change	1999	2000	% change
Letters / E-mail	300,600	598,194	99.0%	9,258	6,396	-30.9%	178	2,005	1026.4%	6,845	6,508	-4.9%
Office Visits	183,031	199,786	9.2%	1,446	1,195	-17.4%	517	183	-64.6%	1,473	9,218	525.8%
Calls	620,583	769,019	23.9%	6,018	6,406	6.4%	2,535	1,678	-33.8%	3,952	7,446	88.4%
Visits to Clientele	99,151	105,352	6.3%	332	266	-19.9%	314	121	-61.5%	1,408	1,449	2.9%
Learning Events	54,073	92,144	70.4%	245	262	6.9%	108	154	42.6%	304	1,204	296.1%
Participants	1,353,584	2,721,438	101.1%	8,637	7,107	-17.7%	3,179	5,756	81.1%	37,750	159,812	323.3%
Instruction hours	756,618	8,202,651	984.1%	453	13,778	2941.5%	3,526	96,617	2640.1%	937	45,330	4737.8%
Mass media used	11,859	1,870,539	15673.2%	98	110	12.2%	72	91	26.4%	481	1,256	161.1%
Contacts through mass media	131,522,953	n/a		13,430	4,319,137	32060.4%	602,840	n/a		391	n/a	
Web page hits	342,462	3,689,927	977.5%	2,152	6,742	213.3%	42	421	902.4%	344,355	4,708	-98.6%
Materials prepared	75,681	121,462	60.5%	77	64	-16.9%	45	78	73.3%	1,184	7,641	545.4%
Direct mailings	1,156,077	2,036,076	76.1%	10,753	23,355	117.2%	2,070	2,592	25.2%	14,056	23,940	70.3%
Other materials distributed	1,169,904	2,309,454	97.4%	1,086	1,678	54.5%	1,209	11,044	813.5%	1,699	134,916	7840.9%
Number of Volunteers	41,781	58,649	40.4%	336	424	26.2%	96	184	91.7%	2,213	2,655	20.0%
Hours training volunteers	41,810	160,013	282.7%	166	641	286.1%	1,579	682	-56.8%	960	7,219	652.0%
Hours volunteered	1,726,962	2,575,149	49.1%	17,963	31,303	74.3%	11,523	2,221	-80.7%	28,637	40,145	40.2%
Volunteer contacts	2,711,722	4,121,688	52.0%	19,347	4,217	-78.2%	1,624	975	-40.0%	38,006	59,332	56.1%

Source: UF Statewide Annual Impact Reports for 1999 and 2000

To meet the last stated objective, Public Service Announcements (PSA's) were developed, pamphlets and brochures were printed, and Web site development escalated. As part of the program, each of the Extension offices in the state was provided a Florida FIRST toolbox--a sturdy polyurethane toolbox filled to capacity with many different types of promotion materials. The PSA's were on videotape in the box for agents' use, and Extension pencils and bookmarks promoting Extension Web sites filled the top tray; all very handy marketing tools. Ideally, an agent on his or her way to a program would be able to just pick up this toolbox and use the contents to promote Extension and help the audience to identify these programs with their sources. Public awareness was recognized as the best way to implement a "pull marketing strategy" rather than a "push" for IFAS/Extension's services. The public couldn't demand that their local representatives support IFAS programs unless they knew how IFAS benefited them.

IFAS/Extension's Current Situation

Dr. Martin again mulls over the comments put forth at the meeting by stakeholders from the Treasure Coast, a three-county area located on the east coast of Florida. They agreed that the need for change is imminent. The county Extension offices were originally developed on a county-by-county basis because studies at the time suggested the average farmer could only travel 18 miles round trip in one day. When Dr. Martin had suggested that regional instead of county-based Extension offices might be the future, the audience of stakeholders didn't balk (but they still insisted 4-H have a county focus). Most important, he saw that even those people already involved with IFAS and supporting it as these people did, still had no clear understanding of the number of different subject areas encompassed by Extension.

Dr. Martin told the group, very truthfully, how much he appreciated their time and willingness to share their opinions on how IFAS/Extension is doing, but seeing how far uphill their battle still had to go was a bit disheartening. Informal studies had shown that more than 65% of the general public still did not know where their County Extension Office was located, were not aware of the information and service provided there, and did not know that their tax dollars supported the County Extension Office. The survey of potential customers clearly contradicts the impression made by the impact statistics. Obviously, the secret was still not out. Dr. Martin suspected the toolboxes were not being used; perhaps Agents were busy enough keeping up with the demands of those already familiar with Extension and did not see the same motivation to promote IFAS/Extension as he did. The impact data Dr. Martin was reading was not completely consistent with his personal findings in the field.

Three years after Florida FIRST was implemented, the imperatives identified were still basically the same, although one stood out above all the others as being the highest priority for UF/IFAS: water management, quality, and allocation. In reviewing the program offerings statewide, Dr. Martin saw that Best Management Practices (BMP's) programs were being offered on a variety of topics. A program being implemented in some coastal counties, the Florida Yards and Neighborhoods Program, promoted water quality and use awareness. Water issues seemed an area that would be in more demand in the future, and IFAS needed to be prepared to meet those demands. Showing their ability to prepare for impending state needs could help establish IFAS again as the clear leader and source for information.

The public's awareness of IFAS/Extension and their belief that the information found there is the best information they can obtain at the lowest cost is key to Extension's success in the future. The opportunity to provide statewide leadership and programming on key issues that will soon affect all segments of the population is there. The threat to IFAS/Extension comes in its inability to identify those programs that are key to its success and retaining the proper staff to promote those programs. IFAS/Extension also needs to be aware of those areas where the private sector or other organizations are duplicating their efforts.

Questions to Be Considered by the Case Study Reviewer

Dr. Martin has some tough decisions to make and a great amount of lobbying to do in order for others in the state to support him, no matter the choice he makes. On which program areas should IFAS/Extension focus its resources? What programs can and should be eliminated? How can IFAS create more awareness of the overall Extension program and the programs of individual counties?

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