

**S-1021 Winter Meeting
Casa Monica Hotel, St. Augustine, FL .
Feb. 21-23, 2007**

Meeting was called to order at 9:00am with introductions of participants. In attendance were Roger Hinson, Alan Hodges, P.J. van Blokland, Jennifer Dennis, John Haydu, Randy Little, Patricia McAleer, Sue Barton, Bridget Behe, Charlie Hall, Forrest Stegelin, Robert McNiel, Ron Rainey, Robin Brumfield, and Marco Palma.

The meeting agenda was presented by the President with the floor opened for additions or corrections to start the meeting. The minutes were distributed and reviewed. Hall made a motion to dispense with the reading of the minutes and to accept as received and the motion was seconded by Little. The motion was passed along with a few noted corrections to the minutes of participant name spelling and committee/project titles.

The chair comments begin with discussions regarding the annual report summary. He noted that a number of the committee participants had not submitted their progress reports (SD421 and reference material) for this past year. Charlie commented on the administrative issues of the 421 reports, as faculty have deadlines for posting their respective reports.

There were no administrative reports or updates presented.

Patricia McAleer participated in the meeting on behalf of CSREES (Henry Hahn). She began discussions by outlining potential external funding opportunities for the upcoming year. She noted the multi-state and multi-disciplined activities of the group and how a number of our projects would be attractive to various competitive programs. She strongly encouraged more participating by our group in the CSREES competitively funded programs. She distributed overview information for a number of the programs which included the prosperity for small and medium sized farms, national integrated water quality program, and Risk Management Agency among others. Additionally, McAleer commented on the LOGIC model in terms of reporting and noted that they are in the process of simplifying the reporting system. Almost everything will be reported in the CRS model. She discussed the budget briefly, the overall funding level will remain the same although there has been a shift in the formula funding. Hall expressed concern on the changes in NASS resources and plans for conducting the specialty crops survey. Hinson commented on the extrapolation issues in that only 17 states are surveyed. Dennis commented on the usefulness of the information for education efforts and the potential loss of existing resources and educational material if the survey is not conducted.

Hall and McNiel commented on the usefulness of the CSREES material that was distributed to meeting participants and thanked McAleer for the material and her insightful comments to the committee.

The next agenda item, committee reports, were as follows:

Web-Page Update

Hall discussed the website and the transition to a new URL from the existing www.s290.org. The URL subscription will end this month, but will remain active during the transition. By the summer meeting, the new URL for the committee will

change to www.s1021.org. [Addendum: Hall has since reported that the new URL is now up and working]

Container and Landscape Cost manuscript

McNiel started the discussions by distributing copies of the draft landscape cost report to the sub-committee members to review. Hall, Haydu, Hodges, and Mathers make up the landscape publication review sub-committee. He noted that work was on-going with the container report and that an initial draft should be available by late spring. The review sub-committee for the container report are Stegelin, Hall, Haydu, and Hinson. It was noted that the field cost manuscript review committee would be set during the upcoming 2007 summer meeting.

NRAES

Hall began by detailing the aggregate sales of our two publications through the website. The group's publication, *Entering a Garden Center Business*, has surpassed 1000 orders and the other publication, *Enhancing Profitability in a Greenhouse*, sales are approximately 75 orders. A few questions were raised regarding potential of adding additional publications to the site. It was noted that the publication committee would handle arranging the landscape cost report to be sold on the site.

Economic Impact

Hodges noted that a lawn care and sod economic impact study was recently completed. The newest study was a companion piece to the recent national green industry economic impact study. The new study included golf courses into the green industry analysis. The study was completed and presented in summer of 2007 during the Southern Nurseryman Association (SNA) meeting held in Atlanta, GA. Hodges provided an overview of the report noting that an article discussing the sod companion piece was published in *HortTechnology*.

Hodges along with Haydu commented on the potential to collaborate and develop a Southern Cooperative Series report from the analysis. The manuscript is available on-line at the committee's website and on the University of Florida website. Hodges commented on sending an electronic copy of the manuscript to the committee to proceed with a series report. Hall commented on the series review and publishing process noting the internal review process. Hodges additionally noted the opportunities for regional and sector publications for both the green industry and the sod analysis. Dennis and Behe expressed interest in developing a Midwest green industry report and Brumfield for the northeast.

Lastly, Haydu commented on a couple of state bulletin reports that were developed through their University and professional association based on the economic impact analysis. He encouraged other states to explore opportunities to promote the economic impact of the industry in their respective states.

Consumer Purchases

Dennis and Behe reported have an article in press discussing garden center purchases. They have an additional publication in review that examines gardening participation for home owners verses home renters. Behe reported on a third analysis that examines internet search behavior that is on-going.

Other publications

Palma discussed his dissertation research concerning a national study examining flower purchases. He noted that the analysis includes some demographic

information along a regional analysis. He currently has an article in review for the national analysis. He noted the regional differences from the analysis.

Haydu noted that the national sod production will be published in the upcoming June issue of JEH. Little noted that Richard Harkess has a publication on selection/use of native plants primarily covering zones 7 and 8 looking at why native plants are selected and the motivations.

The meeting then moved into discussions on the progress of current studies which included:

Labor study

A summary was supplied on the project by Alejandra Acuna, graduate student under Dr. Mathers' direction who is responsible for the project. A report on the project will also be presented at ASHS in July 2007 and SNA in August. Alejandra Acuna is currently finishing her Master thesis and has two journal articles in preparation.

The greenhouse and nursery industry generated more than \$16 billion in sales during 2006 (Jerardo, 2006) and generated an annual payroll of more than \$3 billion. Basic information on the patterns of farm labor can be obtained by four major sources: <http://www.ers.usda.gov/Briefing/FarmLabor/FarmLabor/#naws>. The National Agricultural Workers Survey (NAWS), The Current Population Survey (CPS), The Farm Labor Survey (FLS) and The Census of Agriculture ERS (2003). However, there have no workforce surveys conducted specifically for the nursery industry. The majority of the worker level of nursery staff nationally is Spanish speaking; but there is no formal information to support that belief. The objective of this project was to characterize the nursery industry labor force with the help of researchers in Ohio, Michigan, Delaware, Tennessee, Florida, Indiana, Kentucky, Arizona and Rhode Island. A Self Administered Questionnaire (SAQ) in English and Spanish was administered to our target population. A permission to collect data from the nursery workers, using an anonymous, voluntary and mailed survey was obtained by the Ohio State University Institutional Review Board (IRB). A stratified random sample was taken from each state (strata) and the sample size within each strata was the number of nurseries contacted in each state. A total of 4466 surveys were sent from Columbus, Ohio; 1548 surveys were returned. An analysis of frequencies, mean, standard error and margin of error was calculated for key questions, using SPSS version 15. The majority of the workers surveyed were general laborers, men between 18 to 34 years old, a middle school level education, made an hourly rate salary between \$8 to \$9.99 and came from Mexico. From a total of 227 crew leaders surveyed more than a half are Mexicans. Thirty eight percent of the workers have been working in the industry for less than 5 years. The primary language spoken at work by the workers was Spanish (70.8%) and 22% of them do not understand any English. The primary source of the worker's technical information is their supervisors and 80% of the workers are interested in taking English or Spanish classes.

Several committee members noted the importance of the labor issue as well as the sensitivity and political nature of this issue. Palma commented on a pending proposal to address the legal issues of labor from both a grower and worker perspective looking at issues in Texas.

Hodges commented on an on-going analysis researching wages and benefits for the industry. Hall commented on the American Nurseryman trade journal and lawn and

landscape magazine recent analysis and publication of wage and benefits information for the U.S.

Business Benchmark Analysis

Hodges noted that they have updated the benchmark data for 2004 but don't have enough data to update the sector. They have redesigned the website and Hodges provided a general on-line overview of the site. They presently only have FL data on the website. The data entry forms are updated to provide data from other states. <http://Hortbusines.ifas.ufl.edu/hortnba> is the website for users to sign in. The site has an automated system for users to log-in. The program has a rule for a minimum of 5 observations to maintain individual user confidentiality. Once the minimum has been reached, the program will generate an average. Haydu commented on discussions with Farm Credit to get access to financial data from growers. Farm Credit would seek permission from the grower to share the grower's data. P.J. noted the possibility to have support from Farm Bureau to assist with credibility issues. The on-line system is open to anyone and has secure access.

NASS

Hall commented on the earlier comments regarding NASS future data collection efforts for specialty crops. Hall asked that Henry facilitate the setting of a meeting to discuss this issue with NASS officials between committee members and NASS.

Invasive plants

Barton commented on the emerging issue of evasive species and the need for additional analysis. She gave a presentation discussing the issues in four broad areas:

- 1) research on non-invasive cultivars of invasive species,
- 2) legislation/regulations enacted in some states,
- 3) voluntary programs,
- 4) methodology for determining invasiveness.

Barton provided a general overview of the various research potential as well as potential industry impacts. There is a committee (Mathers, Barton, Behe, Hodges, Dennis and Haydu) investigating these issues further. Stegelin commented on some on-going work to address this issue in Georgia. Barton agreed to communicate with sub-committee to move ahead on this issue.

Specialty Cut Flowers Budget

Brumfield commented on her on-going work for the cut-flower budget. She reported presenting a paper at ASHS in New Orleans this past year. She expressed interest in collaborating with others if interest exists. Stegelin commented on their approach to identifying which flowers in terms of querying their state association to identify the specific flowers to investigate.

Container Cost Budget Zones 8 & 9

Hinson commented on the project to update container production costs on zones 8 & 9. He handed out an "early draft" of the cost estimate and gave an overview of project activities to date including discussions of the Mississippi State Budget Generator (MSBG) program. Hinson noted that the current budget was for a 1 gal. azalea cost estimate and mentioned some of the possible flowers under consideration. He hoped that the budgets would be available by late spring and requested feedback from committee participants. Hall commented that the budget reflected the "growing" costs and that some of the unspecified expenses include other overhead

costs (facilities, etc.). Hinson indicated that the sub-committee would need to meet to discuss the preliminary findings. The sub-committee on the container cost budget will meet following the meeting.

Consumer Perceptions and Behavior

Behe commented that there was no formal report, but that she should have a progress to report for the summer meeting.

RFID

No report given, but there was some limited discussions about the potential uses for this innovative technology in horticulture industry. Stegelin commented on some potential for the technology and its utilization on a per plant level. The sub-committee includes Harkess, Behe, Henson, and Hall.

Organic

Dennis commented on some initial thoughts. She is currently looking at organic perceptions of consumers for fruits and vegetables. She is interested in collaborating on some research for nursery/greenhouse products. She will provide an update at the summer meeting. Barton commented on some broader issues of sustainability, low impact, design/landscaping issues. It was agreed that the issue would be discussed during the summer meeting. If there is interest, participants should contact Dennis.

Other

Barton commented on invasive species work that is on-going. Barton and Behe are currently looking at collaborating to develop a framework for each state to develop "livable plants". The program would follow Barton's efforts in a program called, Plants for a Livable Delaware. Initial efforts would use 3-4 states to develop the framework prior to expanding the program. She provided an overview of her current program regarding livable plants in her state. The sub-committee on invasive plants will meet following the meeting.

On another issue Dennis discussed an upcoming colloquium on barriers to increased horticulture trade volume for horticulture products. The meeting will be held as part of the ASHS in Scottsdale, AZ on July 16-19. If interested in the program contact Dennis.

Randy commented on some additional efforts to research the cost of production analysis and marketing of sod in Mississippi.

Hall noted that the Southern Nursery Association (SNA) call for titles recently went out and are due by April 1. The paper deadline is June 1. The research conference is scheduled for August 8-9 in Atlanta, GA. Details are available online at www.sna.org.

Stegelin noted WERA-72 project which currently has call for papers. He noted that the committee had interest in S1021 sponsoring a session at the conference. The meeting is scheduled for June 17-19th, 2007 and is held in Las Vegas, NV. He will send out a follow-up email inviting participation to the conference which will focus on farm competitiveness and profitability.

The summer meeting will be held in Portland, Oregon on August 22-24, 2007 just before the Far West Conference and Trade Show. McNeil commented on the possibility of this committee presenting during the educational program.

Winter meeting for 2008 location was discussed. Hall listed previous locations and it was noted that the group has not been to Texas for a few years. Participants voted and Austin was decided as the location for the winter meeting, looking at the third week of February as a tentative date.

New officer elections will be held during the summer meeting. The nominating committee is the five former committee chairs (Hall, Behe, Hinson, Barton, Stegelin).

The committee reflects appreciation to Alan Hodges for efforts setting up the tour and the arrangements. Participants expressed gratitude for a terrific location and well organized tour and meeting.

Meeting adjourned at 3:20pm for sub-committee meetings.

Submitted by
Ron Rainey
Secretary