

## **Minutes, S290 Technical Committee meeting, March 21, 2003**

Present: Barton, Beattie, Behe, Brumfield, Dennis, Fields, Hall, Harkess, Hinson, Hodges, Kelley, Knight, Kuehny, Maynard, McNeil, Posados, van Blokland

Chair Behe called the meeting to order at 8:30 am. Minutes from the summer meeting in New York had been posted on the S290 website. These were distributed for review. Hall moved to approve, McNeil seconded, and the minutes were approved as distributed.

One new member of the group, Deacue Fields from Auburn University, was introduced. Behe expressed the group's appreciation for the tour, which included St. Rose Nursery, the New Orleans Botanical Garden, and a US Forest Service presentation. Kuehny was commended on his tour organization and food selection.

Neither the administrative adviser nor the CSREES adviser was able to attend.

After approval of the agenda, Hall discussed the S290 webpage, which has been transferred to [www.S290.org](http://www.S290.org). There has been change in the format and general updating. The site's pages include the Project Statement, Project Participants, Annual Reports, Meeting Minutes, and Resources. A new component will be photos of tours associated with Technical Committee meetings. Links to individual pages/email addresses are provided. Questions about the links and finding publications were answered. The Committee expressed appreciation to Hall for his work in updating the page.

It was noted that the project must be rewritten and resubmitted next year. A writing committee will be formed at the summer meeting. Project participants will be asked to contribute objectives and selected pieces of the next project.

Chair Behe discussed the annual report requirement, and requested that copies of CRIS reports be sent to her if these have not been put submitted through regular web reporting.

### **MANUSCRIPT REPORTS:**

Container cost of production work for zones 5 and 6 – McNeil. A student is entering data into the program. He expects these will be completed by end of semester (May), and that the work will be reviewed before the next meeting. Hall volunteered to review the student's work. The text is online, but the spreadsheets are not. The latter issue is related to who will maintain the program and answer questions.

Hall reported that the greenhouse research has been published after reviews from NRAES, and he is sorting out these comments. The work already is available as an S290 publication on-line. A related work may be published through NRAES.

Pot-in-pot production cost – Hall. This has been published and is available on the Southern Directors' website and through S290. Maynard noted that other pot-in-pot research work is available, and that he will lead work on a second publication.

Garden Center cost of establishment and operation – Barton. This work is published as a book through NRAES, and is available in hard copy for an estimated cost of \$15. This edition has significant additions compared to the last one. Hall noted that the financial numbers not updated, and emphasized that these were not changed because this is an example of how to do analysis rather than a set of numbers to be used for decision-making. The high quality and contribution of this work was noted. It was decided to submit the publication for an ASHS award. Barton volunteered to submit paperwork.

Landscape Service Quality – Behe. There was an interruption in progress toward completion of this project, but the work now is expected to be taken to conclusion. One article from this work has been published in HortScience, and some additional regression tree analysis has been done.

Poinsettia consumer preference – Behe. Data have been collected from several locations and will be analyzed and a manuscript prepared for review on or before the summer meeting.

Willingness-to-pay for disease resistant Dogwood – Behe. This has been published as an Experiment Station Bulletin by Brooker. An article was submitted for publication but rejected, and will be resubmitted to HortScience.

Starting a Business – Kelley. There has been work on a manuscript and spreadsheet. Posados, Hall and Turner are reviewers of the spreadsheet.

#### STUDIES IN PROGRESS:

Nursery Trade Flows survey, 2003 – Hall. 2004 is the year for the 4<sup>th</sup> Trade Flows and Marketing Practices survey. Hall led the group through a review of the instrument. One significant addition, a question about water use, has been suggested. Input is needed on the structure of the survey. Hall noted the comments from the discussion and asked that additional comments to Brooker. There should be another revision for comment at the summer meeting, and members also will get an email soliciting comment. The survey is scheduled for mailing in January, 2004.

Price study – McNeil. In the price study, images of price data from 5000 nursery catalogues, some back to 1880, have been collected. Plants have been selected and data from 5 firms has been provided to Turner, who is working on the analysis. There are differences in the length of these series. McNeil noted some trends, and used as an example Monrovia data since 1945 on Crepe myrtle. Brumfield and van Blokland also are on this committee and will provide review.

Evaluation of state promotional programs – Knight. A draft version of the survey has been created and mailing is expected before the summer meeting. Its target is prior to the end of the spring sales period. Participants should expect an email with attached

preliminary version of the instrument within 2 months. It was suggested that perhaps some of this information could be included in the TFMP survey.

Specialty cut flower budget – Brumfield. While a grant proposal was rejected, several members sense a need for these budgets. Kuehny will ask another trade association for funding, and other funding ideas were discussed. Interested individuals include Brumfield, Kuehny, Kelley, Harkess.

Business Analysis – Hodges. Hodges received a grant from Florida Nursery Association to develop a business analysis as an automated online system, geared toward wholesale nursery growers. He hopes to include the landscape industry. This will be a streamlined, easy to use product directly useful to a grower. There has been lots of input from professionals. A professional website developer has been hired, and the objective is to have the software running by yearend. Because FNGA has funded this work, there will be a ‘members only’ part of the site, but some portion will be available to the general public and that will include the benchmark analysis. In the members only section will be private confidential information and additional benchmarking. If successful, this could be expanded to interested states, and to include garden centers later. Landscape was mentioned, but that is expected to be a major challenge. Other benchmarks include GCA (these will be updated soon), and LACA. There also are commercial strategic profit models in the market. Among other researchers, Uva at Cornell has initiated a business analysis but it is not electronic. These two need to be consistent so they can be expanded. The business analysis may be considered as an objective for the next project. The importance of safeguards for electronically transmitted information is critical.

Finance - van Blokland. The quality of financial analysis that S290 offers may be limited because it does not include a focus on the items that must be paid with profit, Sales (also income or earnings) may be spent on 3 things - salaries, investment/reinvestment and payoff of principal. In a budget, we should include how these 3 components will be paid. He asked what are the opportunities to add this kind of analysis to assist firms in financial management, and for the industry to incorporate these requirements into analysis. He will prepare an information sheet to the committee for comment.

Perennials – Beattie. Work again is underway on the topic, and it is expected to be distributed soon in electronic format. Behe will assist with this work.

## MEETING SITES

S290 usually plans ahead by 2 meetings. Since a symposium has been accepted at AAEA, the group voted to hold the summer meeting in conjunction with AAEA in Montreal, July 27 thru 30. We will organize a tour on a day the symposium is not held.

For the Winter 04, meeting, Haydu had suggested the Tuscon, Arizona area, where there are examples of subirrigated greenhouses, interesting retailing, and other features. McNeil had investigated San Diego. The group chose San Diego with preferred dates of January 21 thru 24.

### AAEA SYMPOSIUM

The title involves competition, size and pricing in the industry. Three papers, preferably with multiple authors, will be presented. Volunteers included Brumfield, Hall, Barton, Hinson. All are invited to work on these papers, but to be part of the symposium, ideas must be returned to van Blokland by March 25, 2003.

Elections: Motion by van Blokland, second by Kuehny that current officers continue. The motion was approved unanimously. Behe remains as chair, and Hinson as secretary.

Sub-committee meetings scheduled to follow the full committee meeting included specialty cut flowers and prices.