

# Revenue Enhancement for Florida Cooperative Extension

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By the Revenue Enhancement Steering Committee:

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### I. Introduction and Rationale

As we enter the next 100 years of the Florida Cooperative Extension Service, our primary goal is to keep a strong presence at the University of Florida/IFAS, at Florida A&M University, and in our counties across the state. As availability of our traditional federal, state, and local funding sources becomes more limited with time, maintaining our capacity to deliver the education programs that Floridians need will require us to generate alternative funding. Base funding has long been supplemented by grants, contracts, gifts, sponsorships, and cost recovery (user) fees. We wish to enhance these sources while keeping within Extension's mission:

*The Florida Cooperative Extension Service partners with communities to provide quality, relevant education and research-based expertise to foster healthy people, a healthy environment, and a healthy economy.*

The main reasons for revenue enhancement are to insure the long-term sustainability of Florida Cooperative Extension's educational programs and to enhance extension services. We can no longer conduct "business as usual." Revenue enhancement will allow us to build a stronger extension program delivery network and provide better service as we address our Extension Roadmap initiatives and super issues. As we strive to improve, we will assess our existing funding limitations, improve current extension programs, develop new ones, and promote self-sustaining programs. Strengthening extension will require diversification of our funding portfolio in a way that complements base funding.

### II. Objective

The objective of the Revenue Enhancement Steering Committee is to provide policy and procedural recommendations to the Dean for Extension and the Extension Administration Leadership Team that will create a consistent and uniform approach for diversifying the IFAS Extension funding portfolio. Components of this objective include:

***Professional development for faculty, including training on:***

- How to think like an "intrapreneur" in the development, marketing, and delivery of educational programs. Faculty should think of the educational programs and services they provide as products for which an appropriate fee is collected. Like small business owners, we need to develop and sell products that consumers will buy and aggressively communicate these deliverables to those who can benefit from our expertise.

- “Grantsmanship,” i.e., grant writing and management of grants and contracts.
- How to develop relationships with sponsors.
- How to work with the IFAS Development Office to increase gifts and giving to IFAS Extension.

***Streamline revenue collection, banking, and disbursement processes, including:***

- Improving banking options for incoming cash and checks.
- Facilitating credit card use by extension clients to receive payments and fees.
- Expanding the use of UF purchasing cards by county extension faculty.
- Facilitating registration for fee-based extension programs using a dedicated website operated by a registration coordinator.

***Extension program budgets.*** Describe how to estimate the true cost of an extension program through a budgeting process.

***Setting appropriate program fees.*** Provide guidance on how fees for programs should be determined.

***Emphasize simplicity.*** Provide a suite of revenue enhancement options and let faculty choose those that best fit their extension programs.

### **III. Guiding Principles**

1. Ultimately, revenue enhancement will lead to Florida Cooperative Extension **service enhancement**. Extension will stand the best chance of clientele buy-in if revenue enhancement is sold based on this concept.
2. The components of revenue enhancement are grants, contracts, gifts, sponsorships, cost recovery (user) fees, for-sale products, and royalties.
3. Revenue enhancement should be considered in overall extension program planning. Its mechanisms will be transparent and accountable, and it will have consistency of processes and tools.
4. Collecting revenue will not be the main factor that sets priorities or evaluates the success of an extension program.
5. Cost recovery fees associated with UF/IFAS Extension programming will be mission-based and customer-driven. Fees should be charged to recover some or all programmatic costs, depending on the program. Revenue generated will be used to sustain or enhance program delivery capacity with time.
6. Cost recovery practices will not limit audience participation. Base level service and services for limited-resource audiences should be free of charge. Enhanced-level service should be fee-based. There is no definitive rule describing limited-resource participants. Faculty in charge of the program will determine if participants should have fees waived or reduced. Faculty shall work to make provisions in their budget to obtain funds from sponsors and

others to underwrite fees for these limited-resource participants and offer scholarships when necessary.

7. Revenue generated from cost recovery will remain in the county extension office, campus department or center, Research & Education Center, program area, or administrative unit in which it is generated. This revenue is designated for use by the faculty who generated it to enhance extension programming. Funds can be used for operating, travel, professional development, state curriculum, and personnel expenses to hire contractual employees that support the program effort. Funds will not be used to offset tenured (includes permanent status) or tenure track employees' salaries or benefits. (See Appendix 1.)
8. Revenue enhancement at the Extension Administration level could occur by re-purposing funds traditionally distributed from the Dean to units and counties. These unit and county-directed funds would be replaced by local revenue generation.
9. All extension faculty will be encouraged to participate in cost recovery.
10. Volunteers or others who support or deliver extension programs may be charged fees to cover the cost of materials used in training they receive.

## **IV. Elements of Revenue**

### **Grants and Contracts**

Grants and contracts are major extramural funding sources for research programs, but less so for extension programs. Although most Requests for Proposals (RFPs) issued by granting agencies now require integrated research-teaching-extension proposals, RFPs that are exclusively for extension work are rare and are typically not high-value.

All UF/IFAS state faculty are required to conduct research, so applying for funding by responding to RFPs or negotiating contracts with sponsors becomes second-nature for these faculty. On the other hand, county extension faculty do not have a research requirement so acquiring funding may not be emphasized as much. Barriers to revenue enhancement through grants and contracts in counties were identified by surveying County Extension Directors (Appendix 2). These barriers included (in order from most important to least important): 1) Agent work load is full... not enough time to pursue grants and contracts; 2) Lack of grant-writing experience; 3) Not knowing who will provide funding for ideas; 4) Need for help with the entire application package; 5) Incentives to obtain grants or contracts are too few.

The following resources are available to help extension faculty acquire grants and contracts. These resources emphasize how to "navigate the process."

***IFAS Faculty Service Program (FSP)***. This program has been designed in conjunction with UF's Division of Sponsored Research (DSR) for IFAS faculty who may become engaged with external non-federal sponsors in providing a routine service on a fixed price basis. The benefit is that IFAS faculty can accumulate this funding from multiple sponsors into a single project that DSR will establish in Fund 209. (See Appendix 3.)

[http://research.ifas.ufl.edu/docs/pdf/proposals/IFAS-FSP-Jan-2015\\_final.pdf](http://research.ifas.ufl.edu/docs/pdf/proposals/IFAS-FSP-Jan-2015_final.pdf)

**Sponsored Program Agreement** (an expedited grant application process for “small” projects). <http://researchtools.ifas.ufl.edu/spAgreement/>

**Standard grant proposal processing procedure.**

<http://research.ifas.ufl.edu/proposal-processing.shtml>

**Personnel within IFAS business hubs or units.** These individuals assist with the many aspects of grants and contracts.

### **Recommendations: Grants and Contracts**

1. Promote understanding and provide education and training to faculty about grant-writing and current grant and contract resources available, particularly for “small” grants.
2. Create a system at the county level that facilitates the acceptance of “small” grants. For example, create UF cash accounts (called “182” accounts) for each county where small grants and program revenue can be deposited, banked, and spent to enhance local programs. (Purchasing Cards can be attached to 182 accounts, with few limits on what the funds can be used to purchase.) *Note that all revenue generated through 4-H will be kept separately using the county's 4-H Association account and Group Exemption Number (GEN).*
3. Provide information about indirect cost (IDC) rates associated with various types of grants and contracts.
4. Provide incentives (e.g. returned IDC, bonus, earlier promotion, salary supplement) for faculty who pursue and secure new grant funding.
5. Provide UF purchasing cards to county faculty with grant funding.

### **Donations and Gifts**

The IFAS Development Office is the center of fundraising efforts to secure private support for UF/IFAS in partnership with the SHARE Council direct support organization and the UF Foundation, Inc. Charitable gifts provide the “margin of excellence” for IFAS academic, research and extension programs and facilities. This office can be a valuable partner to IFAS faculty. There is one professional dedicated to IFAS Extension (Carré Saunders) and one professional dedicated to corporate relationships (Julie Conn).

Most potential donors to Cooperative Extension have a special relationship with the organization or one or more extension faculty or staff members. These extremely satisfied customers have continually expressed their support, as well as the value they place on UF/IFAS Extension and its programs. A goal of development efforts is to have these stakeholders express their support in the form of a donation or gift. Major foundation categories used to collect gifts include the UF Foundation, 4-H Foundations, Master Gardener Foundations, and other Extension Foundations. These foundations hold both endowed and non-endowed funds.

Ways to capture gifts include:

**Online giving via web sites.** To facilitate this effort, a donation link could be added to each county web site. This link could be added to unit web sites if not already there.

**Donor cards.** A card that encourages and facilitates donations to a specific organization for a specific purpose.

**Annual giving letters.** Possible modifications to these letters include: Sending annual giving letters for extension, as CALS does now; including a designation for extension graduate student assistantships on the CALS giving letter; sending an annual newsletter to extension supporters that shows a list of donors and encourages the letter recipient to join them.

**Indicia attached to e-mail responses, newsletters, etc.** (Directs individuals who were assisted by IFAS Extension faculty and staff and are possibly interested in supporting Extension to donation web sites. Uses a “soft ask.”)

**Face-to-face cultivation of donors by IFAS Development staff.**

**“Commodities for Communities”** – A donation of a specific amount of an agricultural commodity by a producer at the point where the commodity is sold on the wholesale market. This donation provides a tax advantage to the donor.

#### **Recommendations: Donations and Gifts**

1. Educate extension faculty about how the IFAS Development Office works. Improve the relationship between IFAS faculty and Development Officers. These individuals are not “the enemy” who will take resources away from the local level.
2. Educate extension faculty about how to encourage private investment from the community. What are the right things to say? How to answer if someone asks “What can I do to help?”
3. Promote the application of “ways to capture gifts” as shown above.
4. Develop a database or list of extremely satisfied customers (including, but not limited to: families, Master Gardeners, small businesses, corporations, non-profits, etc.). These stakeholders not only serve as strong advocates for IFAS Extension, but they may be key prospects to support Extension with future gifts.
5. Advocate the use of various gift-capturing strategies with individuals in these databases. Relationship building and marketing of Extension should be a continual effort of every faculty and staff member in all facets of interactions with stakeholders.
6. Work with local 4-H stakeholders to increase the number of 4-H endowments in counties.
7. Explore implementation of “Commodities for Communities.”
8. Create an umbrella 501c3 for UF/IFAS Extension (as 4-H did).

## **Sponsorships**

A sponsorship<sup>1</sup> is financial support in the form of money, goods, or services given by organizations or individuals who provide the resources for specific extension activities in exchange for public acknowledgement of that support. Businesses recognize that partnerships with extension will enhance their image in the community. Sponsors gain public exposure as well as new clients by being recognized for supporting extension educational activities and for their commitment to provide excellent service to their clients.

However, sponsorship may have the unintended consequence of implying favoritism of one over the others. For this reason, seeking multiple sponsors, rather than one single sponsor, is recommended. Each extension faculty should carefully define the sponsorships that are and are not acceptable for their programs in consultation with Extension Administration.

Costs such as meeting facility, printed materials, equipment, refreshments, meals, and travel expenses for speakers can be covered by sponsorships. Building in a small revenue excess can be used to create a fund that will sustain, enhance, and grow future programming. Sponsorships allow for more efficient educational programs, greater participant attendance, and higher quality extension programming by facilitating invited speakers with excellent expertise.

An example of an effective use of sponsorships is the newsletter that can be found at <http://citrusagents.ifas.ufl.edu/newsletters/zekri/index.htm>. This newsletter effort plus additional sponsorships acquired for educational events (40+ sponsors in total) generates more than \$15,000 per year for the agent's extension program.

### **Recommendations: Sponsorships**

1. Educate faculty on how to work with corporations to develop them as strategic partners.
2. Educate extension faculty about the expectations of working with corporate sponsors.
3. Enlist assistance from the UF/IFAS Office of Development, Director of Corporate Relations as this individual coordinates and consults on annual sponsorship initiatives to benefit UF/IFAS Extension.
4. Publicize examples of successful sponsorships obtained by extension faculty.
5. Program sponsors should be recognized appropriately in program publicity and materials. A disclaimer statement must be used on the printed materials to ensure that sponsorship does not imply an endorsement, e.g., "Sponsorship of this program does not imply endorsement of the sponsor by UF/IFAS Extension."
6. Sponsors and others who wish to financially support a program frequently anticipate their gift will be tax-deductible. If this is the case, funds must be deposited in either the UF Foundation, Florida 4-H Foundation, or county 4-H Association account. Administrators of these accounts should be contacted for requirements and additional information.

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<sup>1</sup> Thanks to Dr. Mongi Zekri, Multicounty Citrus Extension Agent IV, for providing this description of sponsorships.

## Cost Recovery (User) Fees

Recovering costs associated with extension programs and services is not a new idea. Extension has been charging fees to cover some of the costs of existing programs for a long time. Cost recovery should become an integral part of UF/IFAS Extension. Extension faculty should engage in cost recovery planning as part of the program planning process. Faculty should recognize the opportunities and the need to recover some of both local and organizational costs associated with extension programs and services.

Examples of cost recovery fees:

**Volunteer group fees**, e.g., participation or programmatic fees for Master Gardeners, Master Money Mentors, Master Food/Nutrition, 4-H Volunteer Associations, and Home and Community Educators.

**Service fees**, e.g., insect, weed, disease identification (diagnostics); soil and water testing (Extension Soil Testing Lab); soil pH and electrical conductivity testing (county offices); nutrition and health assessments; financial management consultations.

**Extension program registration fees**, e.g., conferences, seminars, workshops, CEU sessions, certificate programs (e.g., Master Naturalist, Natural Areas Training Academy), tours, field days, day camps, residential camps, special interest workshops, youth events/conferences, etc.

**Products for sale**, e.g., smart phone apps, online modules, publications, other traditional products sold by the Extension Bookstore. (See [http://imm.ifas.ufl.edu/6\\_130/6130-6.htm](http://imm.ifas.ufl.edu/6_130/6130-6.htm).)

### The Cost Recovery Continuum

Cost recovery for extension programs follows a continuum from **no** cost recovery to **full** cost recovery. Determining the **private to public value ratio** of an extension program determines where it falls within this continuum. (See Appendix 4 for examples.)

**No cost recovery programs** are primary and fundamental to the mission of UF/IFAS Extension. These programs have no charge or minimal charge. They are typically open to the general public, contribute to the “public good” (high public value), and are part of a base extension program.

*Examples: Any program targeted at low income audiences (e.g., EFNEP), general 4-H club programs, and training for extension volunteers who do not receive any personal benefit from the training. (Master Gardener training would not fall into this category since the participants gain knowledge that is of personal value).*

**Partial cost recovery programs** are highly targeted and content specific, but they are also primary and fundamental to the mission of UF/IFAS Extension. They are based on existing programs and are modified or customized for a specific individual, business, or narrowly defined group that is the primary beneficiary. They may be classified as programs for the public good, but they may not be

offered without additional financial resources. Partial cost recovery should include direct costs and may include recovery of indirect costs.

*Examples: Repeated visits to a single farm in a consulting mode, crop production meetings, home gardening classes, soil and plant testing service, private pesticide applicator training, 4-H summer day camps, 4-H project achievement, 4-H horse shows, food preservation classes.*

**Full cost recovery programs** are customized programs developed for a specific group, individual, or business that realizes primary economic benefits; i.e., where there is an identifiable “private good” (high private value) to the individuals, group and/or business. In addition to programming, this could include ongoing one-on-one advising for a specific individual, group, or business on a topic that may be beyond the scope of our day to day responsibilities.

*Examples: Food safety certification program for restaurant workers, commercial pesticide applicator training for a company’s employees, forest tax training for CPAs, child care provider training for licensing and/or renewal, a strategic planning retreat conducted for a local non-profit agency.*

The types of extension programs offered differ widely. Some programs are targeted toward individuals, families, community and government groups, and businesses. These programs generally fall in the category of no cost or partial cost recovery. Then there are programs requested that provide customized educational offerings for exclusive or private audiences. These programs fall into the category of full cost recovery. A general overview of the programs and how they may be viewed in making a determination about the level of cost recovery is reiterated below:

***Characteristics of programs involving no cost or partial cost recovery:***

- Anyone may attend the program.
- Materials are available broadly and may be shared with others.
- Subject matter expertise is readily available.
- Time needed to develop the program is a part of the overall plan of work.
- Time needed to deliver the program is reasonable within the professional’s work assignment.
- The program is part of ongoing efforts and may be broadly applied and utilized.
- No formal certification or credits are offered.

***Characteristics of programs involving full cost recovery:***

- Attendance is only for an exclusive group where there is an identifiable private good related to the programming effort.
- Programs and services require customizing the curriculum for an exclusive group.
- Subject matter is appropriate for extension, but current faculty may not have the expertise to develop and conduct the program. Consequently,



such efforts would require specialized training, development, etc. to fulfill the programming request.

- Continuing education units or certificates may be provided for completing the course/program.

Successfully implementing cost recovery hinges on knowing how much it costs to hold an extension event. Having a good idea about the cost of doing extension's business is essential for grants, contracts, and sponsorships, and this knowledge also helps stakeholders understand and support user fees.

### Determining the cost of extension programs

Determining the delivery cost of an educational **event** is a budgeting exercise. An educational event is an activity that happens on a particular day, time, and location. Specific people are named to cover the topics and an estimated number of participants. More broadly, an extension **program** includes a set of statewide events, activities, services, publications, websites, newsletters, or other means to accomplish a set of objectives for a defined target audience. The time frame for programs is years. Appendix 5 shows an example of how to estimate the cost of an extension event. All sources of cost should be considered: time, travel, materials, meals, speakers, etc.

### Methods of collecting fees

***Independently***, using unit staff.

#### ***Approved university offices:***

- *UF/IFAS Office of Conferences and Institutes.*
- *UF DCE.*
- *TREEO.*
- *FAMU Office of Continuing Education.*
- *4-HOnline Enrollment Management System*

***EventBrite (or university-approved equivalent)*** – A company that allows faculty to collect credit card fee payments through an online site. After the date of the program has passed, Eventbrite sends the hosting unit a check minus EventBrite processing and fees. These checks should be deposited in the IFAS Incidental Trust Fund for that unit (fund code 182 for extension). See [www.eventbrite.com](http://www.eventbrite.com).

### Payment types used to collect fees

***Cash and checks.*** When collecting and receipting checks and cash payments, the hosting unit must ensure all staff associated with the event following standard procedures as outlined in the UF's Finance and Accounting Directives and Procedures: <http://www.fa.ufl.edu/directives-and-procedures/cash-collections-receivables-and-investments/>.

***Credit cards.*** If a unit wants to accept credit card payments for events either on-site or through an external vendor, the equipment and transaction must be a certified as PCI-compliant, which means the credit card industry has examined

and approved the level of security the vendor has in place. See <http://www.fa.ufl.edu/departments/treasury-management/card-ops/>.

When fees are collected, they should be deposited into the IFAS Incidental Trust Fund for that unit (fund code 182 for extension).

#### Handling and reporting of cost recovery fees collected

In any cost recovery plan for an extension program, acquiring, handling, distributing, and using revenue needs to be established and agreed upon by the respective administrator(s) and faculty/staff prior to initiating the program. It is essential that appropriate university collection and accounting practices be followed in handling all funds. (See “Handling Funds in County Extension Programs” document on the District Extension Director’s website for further details: <http://ded.ifas.ufl.edu/index.shtml>.) All checks and cash must have receipts. When totals exceed \$500, the amounts must be deposited within 24 hours (or on next business day) in the agreed upon account. The respective county or unit where cost recovery fees are housed must maintain an accounting and appropriate records. On an annual basis, for the fiscal year, records will be reviewed to ensure compliance with all university and federal regulations.

#### Recommendations: Cost Recovery Fees

1. 4-H Youth Development.
  - a. There should be no annual state membership fee to belong to Florida 4-H.
  - b. 4-H club members may be charged a fee to cover costs associated with participation in certain 4-H club activities. Charges associated with these activities may include direct costs as well as a limited amount for indirect costs. For example:
    - i. State level: Florida 4-H Council (state council) charges every county \$50 annual dues in order to have voting delegates at 4-H state council meetings.
    - ii. District level: District III 4-H Youth Council charges every county in their district \$30 annual dues to go towards fees for their district delegates to attend state council executive board meetings.
    - iii. County/local level: With the new 4-H Associations, counties have the option of charging up to 3% of a 4-H club or a 4-H affiliate’s income “for the purpose of providing for expenses associated with managing the account.”
  - c. No 4-H club member should be denied the opportunity to participate in educational programs based on their ability to pay a participation fee.
2. Master Gardeners (MGs).
  - a. MGs should be charged a program fee (one-time charge to train new MGs).
  - b. MGs should be charged an annual membership fee to support the state office.
3. Administration of cost recovery guidelines.
  - a. Fees may include both direct and indirect costs. Fees will be determined using the Cost Recovery Worksheet (Appendix 5).

- b. Funds collected shall be deposited into an appropriate unit-based extension account (county bank account, 4-H Association account, advisory committee bank account, "182" account).
- c. Fees must be collected, deposited, and expended following the to-be-determined UF/IFAS Extension Funds Policy.
- d. It is the responsibility of the faculty/staff member coordinating the program to ensure that appropriate university and extension policies are followed when fees are charged.
- e. A cost recovery worksheet must be prepared by the faculty/staff member for all major programs and reviewed by the appropriate CED or DED.
- f. For any partial or full cost recovery program, the Program Cost Recovery Worksheet shall be kept as part of the official program files.
- g. When a standard program is offered in multiple locations around the state it may be determined that a standard registration fee is beneficial. In this case, a request shall be made to the appropriate state program leader and that individual (with input from the Extension Leadership Team) will determine whether a standard fee should be applied and will help determine the amount of the registration fee to be charged. In some cases, for programs that may also be offered by entities other than Extension, there may be a need to charge the prevailing fee in order to avoid undercutting the competition. In these cases the standard registration fee could be higher than the amount determined using the Program Cost Recovery Worksheet.
- h. An internal "cost recovery" web site should be built for faculty use.

## **V. Goals and Incentives**

Incentives for faculty to engage in revenue enhancement:

- Create a new extension program.
- Improve a current extension program, e.g., expand it, increase its capacity, enhance its quality.
- Collection, storage, and spending of extension program funds at the county level becomes easier due to streamlined business practices.
- Benefits to professional career, e.g., salary supplement, earlier promotion, returned IDC, funds for travel/equipment/supplies/technology.
- High-capacity, popular extension programs lead to revenue sharing. (Example: the state-to-county revenue pass-through in the Master Naturalist program.)
- More opportunities for self-funded professional development.
- Provide a revenue enhancement contribution that advances the capacity and quality of UF/IFAS Extension.

## **VI. Communication Plan**

After a revenue enhancement plan is developed by the Dean for Extension office, it should be communicated in the following ways:

### Internal

- Devote one or more “Extension Connections” sessions to revenue enhancement.
- For academic departments and Research and Education Centers, present the extension revenue enhancement plan at faculty meetings.
- For county extension offices, hold faculty meetings to discuss the plan. Show how obstacles have been removed through the establishment of cash (182) and foundation (171) accounts and the expanded use of UF purchasing cards in counties.
- Include revenue enhancement training in the Extension Faculty Development Academy.
- Promote the merits of extension revenue enhancement at the Senior Vice President’s Cabinet Meetings.
- Include training on elements of revenue enhancement at professional development events like EPAF, FCS Summit, annual CED in-service training, etc.
- Highlight examples of successful extension programs that create new revenue.
- Discuss revenue enhancement plans and actions during annual faculty appraisals by the unit leader.

### External

- County government partners:
  - Develop a set of talking points for County Extension Directors or District Extension Directors to use as they proactively engage our county partners about extension revenue enhancement.
  - Communicate the revenue enhancement plan through our relationship with the Florida Association of Counties.
- State and federal agency partners: The Dean for Extension should engage agencies like FDACS, FDEP, NRCS, DCF, etc. to communicate the revenue enhancement plan.
- Recommendations for communicating revenue enhancement to clientele groups:
  - Personal contact is best.
  - Carry a consistent message; explain that the goal of revenue enhancement is to *enhance extension programming*.
  - Let our clientele groups know in advance that revenue enhancement efforts are coming.
  - Talk more about *program enhancement* and less about *money*.
  - Emphasize that UF/IFAS Extension is not going to charge for *everything*.
  - Use the Florida Farm Bureau to help carry our revenue enhancement message.
  - Extension administrators should have conversations with the Florida 4-H Foundation; develop talking points that filter down to the county-level fiscal agents (e.g., county 4-H associations or 4-H foundations).

## VII. Implementing Revenue Enhancement

Various forms of revenue *acquisition* have been broadly implemented by UF/IFAS faculty for many years. For example, most state faculty regularly obtain grants and contracts to support research programs, while many county faculty procure extension grants, sponsorships, and contributions to support extension programs. However, IFAS faculty may not be aware of the wide variety of options for revenue *enhancement* that are available to them. Implementing revenue enhancement for UF/IFAS Extension will involve four components: *awareness, motivation, education/training, and tracking.*

- The communication plan described in Section VI will create revenue enhancement awareness across UF/IFAS Extension.
- Motivation for a faculty member to engage in revenue enhancement is provided by the incentives described in Section V.
- Education and training can be accomplished through web-based modules on various aspects of revenue enhancement, workshops held at Extension District faculty meetings, in-service training through PDEC, and new faculty development programs. A dedicated website should be created as a “one stop shop” for revenue enhancement information.
- The outcomes and impacts of revenue enhancement can be tracked by:
  - Faculty satisfaction survey.
  - Measuring activity in unit-based 182/171 accounts.
  - Counting the number of multi-county or statewide extension programs that are linked by a state/county faculty partnership.
  - Workload and impact report.
  - Individual faculty Reports of Accomplishment.
  - Faculty report success stories (see examples in Appendix 6).

## Definition of Terms

**Revenue enhancement** – An increase in revenue sources and amounts.

**Cost recovery** – Collection of fees to offset part or all of the cost of an extension program.

**Entrepreneur** – One who organizes, manages, and assumes the risks of a business or enterprise.

**Intrapreneur** – One who behaves like an entrepreneur while working within a large organization.

**Grant** – One party grants funds to another party to do something, in reasonable hopes that the task can be accomplished. If the task is accomplished, typically everyone is happy, which could lead to more grant funding. If the task is not accomplished, there are most likely no legal ramifications as would be the case in a contract.

**Contract** – A legally binding document in which the parties make promises to deliver a product or service in exchange for consideration (usually money.) If you do not deliver under a contract, you are in "default" and you can reasonably assume some justifiable action may be taken against the party that did not hold up its end of the deal.

**Endowed foundation funds** – Endowments have both a principal account and a spendable account. Accrued interest is periodically moved into the spendable account for use by the unit. Expenses must be according to donor intent. For example, the William P. and Janet F. Bushnell Professorship is an endowment that specifically supports a professorship in urban environmental sustainability for UF/IFAS Extension at Pinellas County.

**Non-endowed foundation funds** – Non-endowed funds do not have a principal account and earn no interest. Expenses must be according to donor intent but often these are more general gifts to further Extension programming, perhaps in a particular county or program area. An example of this type of account is the Extension Unrestricted Fund.

**Private value\*** – The value, or benefits, that a program participant receives from the program. For example, increased profits for farmers from an agricultural program, improved health from nutrition programs, or just having fun for youth in 4-H.

**Public value\*** – The total of the indirect benefits received by non-participants as participants make changes. For example, a strong local economy as farmers earn and spend more, reduced Medicaid costs to taxpayers, and more community leaders as 4-H youth mature.

\*Source: Morse, G. W. 2012. Should We Charge User Fees for Our Extension Program? Univ. of Minnesota Extension Economics Notes # 2012-2. Available online at <http://ageconsearch.umn.edu>.

## **Appendix 1**

### **Federal Cost Recovery Regulations**

The United States Department of Agriculture Administrative Handbook for Cooperative Extension Work details user fee regulations in Chapter 3. These guidelines clearly prohibit charging user fees to offset the salaries of Cooperative Extension faculty and staff that are funded at least in part with county, state, or federal general-purpose funds. To comply with this federal policy, we cannot tie state and county cost recovery efforts to the salaries of these personnel. We cannot substitute money collected through fees for state or county appropriated funds. The Handbook further states that clients should be informed what the fees they pay are covering.

Per USDA guidelines, educational activities and services for which fees may be charged to partly or wholly recover costs include the following:

- Services that enhance the basic educational program, like mediated instruction transmission and associated costs (e.g., video conference production and transmission expenses), publications and other materials, computer analysis, computer software, and the overhead costs associated with providing these types of enhanced services.
- Conference-related activities that contribute to agent and specialist teaching, such as expenses for outside instructors, materials, specialized electronic equipment, audiovisual equipment, and rental costs for meeting rooms.
- Supplemental educational programs funded entirely through county or private sources.
- Non-educational costs, such as meals and refreshments, which are always subject to full-cost recovery.
- Services such as soil and water testing, forage testing, plant analysis, farm record analysis, pest identification, etc.
- Programs not supported with government appropriations such as those designed for or restricted to a specific individual, group or business are not subject to USDA cost recovery regulations and shall be handled on a grant, contract, or participation fee basis. These programs shall be entirely self-supported with corresponding fees charged or grant or contract funding received.

## Appendix 2

### Survey on obstacles to acquire grant and contract funding for extension

This survey was intended for County Extension Directors to answer on behalf of their county faculty and also for selected state extension specialists. There were 39 responses.

#### General questions

Question	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
I don't know what grant ideas to propose.	3	18	4	10	4
I have ideas for grants or contracts, but I don't know who will fund them.	0	6	11	14	8
I have good ideas and funding prospects, but I have no time to pursue them.	1	5	5	20	8
I have ideas, prospects, and time, but I lack grant-writing experience.	0	7	9	17	6
I can write the main grant proposal, but I need help with all the forms required to complete the application package.	1	9	8	19	2
I will pursue a grant or contract if I see the possibility of a refereed journal article at the end.	10	14	14	1	0
There are too many headaches and too few incentives for me to pursue grants and contracts.	1	4	14	13	7
My extension clientele will object if my time or resources are diverted to a grant-funded project.	3	15	13	7	1
New grants simply add to my workload, and there is no one to whom my existing workload can be delegated.	0	4	6	20	9
I will not have the time needed to complete all the tasks once the grant is received.	1	10	12	12	5
The indirect cost that the university charges on grants and contracts is too high for my potential funders.	1	1	18	7	12
Grants and contracts are not typically available for the type of extension programs I do.	3	10	15	9	2

#### Rating potential obstacles to obtaining grants and contracts

	Small obstacle	Medium obstacle	Large obstacle	Not an obstacle
My lack of budgeting skills and experience is:	15	9	3	12
The university's endorsement process is:	5	15	15	4
A lack of matching funds is:	10	10	18	1
A shortage of problem-solving bookkeeping support is:	10	10	16	3
A shortage of problem-solving administrative assistant support is:	8	9	19	3

#### Selected comments:

"I do not feel that grants should be a requirement of extension agents for promotion, but it seems to be getting that way. We do not have the time to do the grants, but we would be happy to help specialists with the extension programming from their grants if they include us from the beginning. Including agents at the end as an afterthought is not acceptable. Extension agents who have received large grants say it is such a headache to do all



the paperwork in addition to the work that they do not want to apply for any more. Refereed journal articles are not our goal, impacts are.”

“I feel that the only way we can be successful in pursuing grants is to work as teams with other Extension staff and Extension specialists. I have experience from the past that this model works well. As a CED in a major urban and ag county I have no time at all to initiate grants myself.”

“UF grant procedures and IDC requirements are a huge obstacle when writing small grants. I just wrote a grant for \$4k. \$1k went towards IDC and the amount of steps I've had to go through to get it processed makes me not want to apply for grants. Not worth the hassle.”

“Lack of support staff; most grants do not cover support staff.”

“Because no indirect support is required by the County, we try to run as many grants and donations through the County system. We get great support and credit through our county. I encourage agents to participate in grants whenever practical. If employees cannot be hired to do the work of the grant, through the grant, it is generally not practical to participate.”

“Office of Grants and Contracts is slow or at worst unresponsive to county needs with respects to grants.”

“It was difficult to do this survey on behalf of my faculty, because all have differing experiences (I would have all "N's"), so I answered according to how I think about these questions.”

“Have no desire to pursue grants due to my programming & lack of support staff to assist with administration. Too much work with too little benefit to my programming.”

“Grants divert attention away from needed programming, because they don't always match the needs of the community.”

“If we apply for any other grant other than one that is funded through UF the hoops to go through in the county are very high. First we need permission by the Board of County Commissioners to apply for a grant. To get on their schedule takes usually 1.5 months. Then after the grant is written, before submission you have to re-send through the BCC to make sure 1. The county is incurring no cost; 2. There are no county financial expectations after the grant is completed; 3. There are no jobs involved in the grant because once a position is in place and taken away when funding is over, the Commissioners get very negative feedback and are called upon to keep that position. They do not want to be responsible for this situation. By the time this process is complete, the funding timeframe has expired!”

## Appendix 3

### IFAS Faculty Service Program Guidelines

Issued by IFAS Research in April 2011, revised May 2011 and January 2015

The IFAS Faculty Service Program (FSP) is designed for faculty conducting *routine* services for multiple, external, non-Federal sponsors on a fixed price basis. Services requiring IRB, IACUC, and/or IBC approval, and/or are subject to Export Control or Conflict disclosure (i.e., projects that entail compliance oversight) are eligible, however, as with all activities, faculty are responsible for ensuring the applicable approvals are obtained *prior* to providing the service.

#### Features of the FSP:

- Faculty member may qualify for up to three FSPs based upon the service provided and appointment (Research, Teaching, and/or Extension).
- One time set-up covers a 5-year period.
- \$15,000 cap with 15% indirect cost (i.e., total funding cannot exceed \$17,250) per service commitment.
- No contractual agreements allowed.
- Services can be pre-paid or invoiced after the services are complete, however, pre-payment is only allowable when the service does not require compliance oversight.

#### FSP approval and account establishment process:

1. Access the [eDSP-1](#) tool and select the “Create a New Faculty Service Program (FSP)” option; complete the program information, provide a brief description of the service (50 words maximum), and complete the assurances and contact details by clicking “Save Changes” and “Proceed to the Next Step”
2. Once all the questions are completed, click “Return to the Main Menu” and click “Generate DSP-1” and “Generate Service Form” (do not make changes to the auto-populated project title); send the signed copy of the DSP-1 and the Service Form to the [IFAS Proposal Processing Service Desk](#)
3. The appropriate Dean will review and sign the DSP-1 and your submission will be returned to the Unit/REC
4. Create a record in [PeopleSoft](#) to generate a project number and specify end date within 5 years; this can be done by either the PI or a grants specialist
5. Send the signed DSP-1 and Service Form to [DSP](#); include the PeopleSoft project number

#### To receive payments through Contracts and Grants (C&G):

1. Complete the attached Statement/Request for Invoice for each service and send to the [IFAS Team at C&G](#) (if the service is pre-paid, forward the check with the statement; if not, forward the request for invoice *after* services are complete)
2. A Notice of Award (NOA) will be issued after each payment is processed
3. At the end of the 5-year period, the account will be closed and any residual funds will be subject to the standard close-out policy.

**IFAS Faculty Service Program  
Statement/Request for Invoice**

PI Name  
(Last, First)

PI Unit

Summary Description of  
Service Provided

UF PeopleSoft Project #

This service involves/involved the following (check all that apply and include the corresponding approval/protocol number):

Human Subjects (IRB): \_\_\_\_\_

Animal Subjects (IACUC): \_\_\_\_\_

Biological Materials (IBC): \_\_\_\_\_

Export Control: \_\_\_\_\_

None

Certifications /  
Assurances

Do you have a current managed conflict of interest agreement with this sponsor?

Yes: Date of approval: \_\_\_\_\_

No

I acknowledge and have completed all required certifications (if any) that are/were applicable to this service:

\_\_\_\_\_  
Principal Investigator's Signature

Name and Billing  
Address of Sponsor

\$ Amount of Service:      \$\_\_\_\_\_ (\$17,250.00 maximum)

Start Date:            XX/XX/XXXX

End Date:             XX/XX/XXXX

Billing/Payment      \_\_\_\_\_ Check attached  
Method                \_\_\_\_\_ Bill sponsor

## Appendix 4 Examples of Private vs. Public Value\*

Private to public value ratio	Educational program examples	Private value examples	Public value examples	Portion of costs in user fees <sup>1</sup>
Very high	Customized consulting with an individual business.	Business is more profitable.	Improves local economy.	All
High	Certification program for builders.	Leads to better employment opportunities.	Improves pool of qualified professionals.	Most
Intermediate	Landscaping lake properties to protect water quality.	Homeowner satisfaction.	Community benefits from improved water quality.	Some
Low	Pilot program on manure management.	Eventually saves farmers money.	Protects natural resources.	Low
Very low	On-line health and nutrition information.	Improves individual user's health.	Reduces health care system costs, reducing Medicare and Medicaid taxes.	None

<sup>1</sup>Includes everything except personnel costs for employees partially supported by federal funds.

\*Modeled after Table 1 in Morse, G. W. 2012. Should We Charge User Fees for Our Extension Program? Univ. of Minnesota Extension Economics Notes # 2012-2. Available online at <http://ageconsearch.umn.edu>.

## Appendix 5 Extension Event Cost Recovery Worksheet

Extension event name: \_\_\_\_\_

Recovery goal: \_\_\_\_\_ Partial cost recovery      \_\_\_\_\_ Full cost recovery

<b>Program and Service Costs</b>		
<b>Item/Expense</b>	<b>Notes</b>	<b>Budget</b>
Advertising (newsletters, media)		
Awards/recognition		
Equipment/depreciation		
Honoraria (meals, mileage, fees)		
Insurance		
Labor (contractual)		
Materials (giveaways)		
Meals/refreshments		
Planning/development cost		
Postage		
Publications		
Room rental		
Technology (telephone, etc.)		
Transportation/travel (mileage, fuel, buses)		
Supplies		
Other (list)		

<b>Salary/Benefits and Other Costs</b>						
<b>Support Personnel</b>	<b>Hours</b>	<b>Avg \$/Hour</b>	<b>Benefits</b>	<b>Total Cost</b>	<b>Other</b>	<b>Budget</b>
Total Salary, Benefit, and other Costs						

<b>Total Cost</b>	
<b>Facilities and Admin Costs</b>	
<b>Grand Total</b>	

## **Appendix 6**

### **Successful Examples of Revenue Enhancement**

**Palm School**  
**Dr. Monica Elliott**

**Professor of Plant Pathology and Acting Center Co-Director, Ft. Lauderdale REC**

The 2-day program officially advertised as “Palm Management in the Florida Landscape,” but better known as Palm School, began in 2005 as an In-Service Training program. However, even for the first program, we included non-IFAS attendees to be sure we heard from all voices associated with palm management. The only charge was \$10 to cover the cost of lunch. This program was repeated for 2 more years for the price of lunch. The ten non-IFAS attendees each year were personally invited, i.e., there was no open enrollment.

In 2008, due to significant IFAS budget cuts, we felt it was necessary to charge non-Extension faculty and staff. (This program is always free for Extension faculty and staff.) The price point was set at \$300. This price was selected because the approximate cost of attending a 1-day program hosted by the Florida Chapter International Society of Arboriculture program was \$150. Announcements were made through the county extension offices and ISA/FNGLA chapters for the first charged program. We continue to advertise the program through these venues, but we also advertise via fertilizer and chemical dealers. We also keep a working list of people who have expressed an interest in the program, and they receive an e-mail announcement for each class.

This program is a group faculty effort that is usually held at FLREC, but is also taken “on the road.” The program includes PowerPoint presentations and hands-on learning experiences. For the latter, we go outside to examine palms in the landscape. When the program is “on the road,” we hold it where palms are located or easily accessible.

The program is limited to 40 people because a smaller group is more likely to be interactive and it makes the hands-on learning experiences manageable. Also, announcing a limit is an incentive for people to sign-up early and it creates an environment of exclusivity. (There is usually a waiting list for most programs.) CEUs are provided for pesticide licenses, certified arborists, certified landscape inspectors, certified FNGLA members and landscape architects.

At the beginning the program was offered annually, but the demand was so great that we began to offer it two or three times each year. While most attendees are from Florida, it is not uncommon to have people attend from the Caribbean Islands, especially the Bahamas. County Extension agents from the southeast have also attended (at no charge).

This program is not designed for Master Gardeners, although some counties have sent their “Super” Master Gardeners who essentially act as their program assistants. A separate 6-hr mini-palm school program was developed for advanced Master Gardeners (people who have already taken the introductory MG program). There is no charge for the mini-palm school, except perhaps for lunch; those funds are collected by the county agent.

The fees generated from Palm School are placed in the Extension incidental account, and all expenses are paid from this account. Income has been used to support a graduate student with a palm problem thesis, faculty research regarding palms, and faculty travel to professional meetings. Total net income through April 2014 is \$144,300.

Below is a table that summarizes the program. Naturally, there is an evaluation form, which has remained essentially the same since 2005. As you can see, the overall rating of the program did not drop when we began to offer the program to the public for a fee.

Table 1. Summary of the 2-day palm school from its inception in 2005 through April 2014.

Date	Number of Attendees*	Knowledge Level Before Program	Knowledge Level After Program	Overall Rating	Gross Income	Net Income
May 2005	30	2.5	3.9	4.8	0	0
May 2006	25	---	3.9	5.0	0	0
May 2007	32	3.0	4.4	4.7	0	0
May 2008	44	2.7	3.1	4.7	\$12,000	\$10,400
Oct. 2008	41	2.5	3.9	4.5	\$10,500	\$9,300
Feb. 2009	41	2.6	4.2	4.6	\$10,200	\$8,900
April 2009 (Pinellas Co.)	39	3.1	4.4	4.9	\$8,400	\$6,800
Oct. 2009	37	2.8	3.9	4.7	\$9,300	\$8,200
March 2009 (Orange Co.)	39	2.9	4.4	4.9	\$7,200	\$2,900
May 2010	32	2.2	4.1	4.9	\$9,900	\$8,600
Oct. 2010 (Duval Co.)	25	3.0	4.3	4.9	\$4,200	\$1,700
Feb. 2011	37	2.8	4.3	4.9	\$7,800	\$6,900
May 2011	35	2.5	4.1	4.6	\$9,000	\$7,900
Oct. 2011 (Pinellas Co.)	32	2.2	4.3	4.6	\$6,000	\$4,000
Feb. 2012	41	2.7	4.0	4.7	\$9,600	\$8,300
May 2012	47	2.8	4.4	5.0	\$13,500	\$12,000
Nov. 2012	43	2.6	4.6	4.7	\$12,000	\$10,500
April 2013	47	2.5	4.2	4.8	\$12,600	\$11,000
Oct. 2013 (Sarasota Co.)	45	3.0	4.3	4.6	\$12,300	\$9,400
Dec. 2013	43	2.8	4.2	4.6	\$11,400	\$9,700
Feb. 2014	31	2.5	4.1	4.6	\$8,100	\$6,700
April 2014 (Okaloosa Co.)	24	2.2	4.3	4.8	\$5,100	\$100

\*This is total number of attendees, including fee-paying clientele and free county faculty/staff.

In November 2014, this program was offered on the Gainesville campus, both as a course for undergraduate students (ORH 3324) and as a fee-based program for non-students. There were 15 students and 17 professionals in the class. The interaction between students and professionals, which included the Supervisor of UF Landscapes/Grounds, was surprisingly good. Because the professionals are not afraid to ask questions, it significantly helped with the learning process for the students. If the students/professionals follow through, one student was going to visit the Marion County Extension office to learn about Extension with CED David Holmes and other students were making plans to visit with arborists and fertilizer representatives on the job.

**The Florida Master Naturalist Program  
Dr. Martin Main**

**Assoc. Dean for Extension, Natural Resources Program Leader, and Assoc. Director, Florida Sea Grant**

The Florida Master Naturalist Program (FMNP; [www.MasterNaturalist.org](http://www.MasterNaturalist.org)) is a natural history, conservation education, and citizen science training program developed for adult audiences. The FMNP has grown with time, from one course in 2001 to seven courses in 2010, with five more FMNP courses in development. Each FMNP course has a specific curriculum, materials, and program requirements. All courses are taught by certified FMNP instructors represented by UF/IFAS Extension and Sea Grant agents and UF/IFAS partner organizations that operate as UF/IFAS instructor volunteers, and who deliver the FMNP under the UF/IFAS and FMNP trademark. These external partnerships have brought UF/IFAS Extension programs to new audiences and resulted in collaborations between extension agents and environmental educators and scientists from many organizations. Quality control among instructors is continuously ensured through course evaluations. The FMNP currently issues about 1,200 graduate certificates each year (all courses). Roughly 30% of participants take FMNP courses for professional development and approximately 6% of report that the FMNP assisted them in acquiring a new job or promotion. These types of impacts have resulted in the FMNP being emulated by states across the country as a model extension education program.

The success and growth of the FMNP (Fig. 1) is in large part due to the fee-based structure and the defined curricula, both of which evoke value. The fee-based structure provides the opportunity to reduce instructor workload and hassle by managing registration, materials production and delivery, and to some extent marketing through contractual arrangements. Revenues are also used to manage the FMNP website; they are also reinvested in new courses and revisions and used in other programmatic elements. This greatly reduces the work and hassle for instructors. Their job is to plan, schedule, prepare for, and teach their classes. The FMNP handles the details through contractual arrangements, the most significant being with the Office of Conferences and Institutes. FMNP fees are also shared with the FMNP Instructors as discretionary programmatic funds for extension agents and organizational support for our partner Instructors. Currently, FMNP shared revenues are \$75/student per class taught (\$90,000/yr @ 1,200 students). During 2001-13, the FMNP distributed \$173,000 to 95 UF/IFAS Extension and Sea Grant agents as programmatic support funds that enabled them to subsidize other Extension programs, travel, and professional development. Consequently, the fee-based structure and fee-sharing philosophy of the FMNP does not simply support the FMNP, it also supports other UF/IFAS Extension objectives and builds strong collaborative partnerships among other organizations.

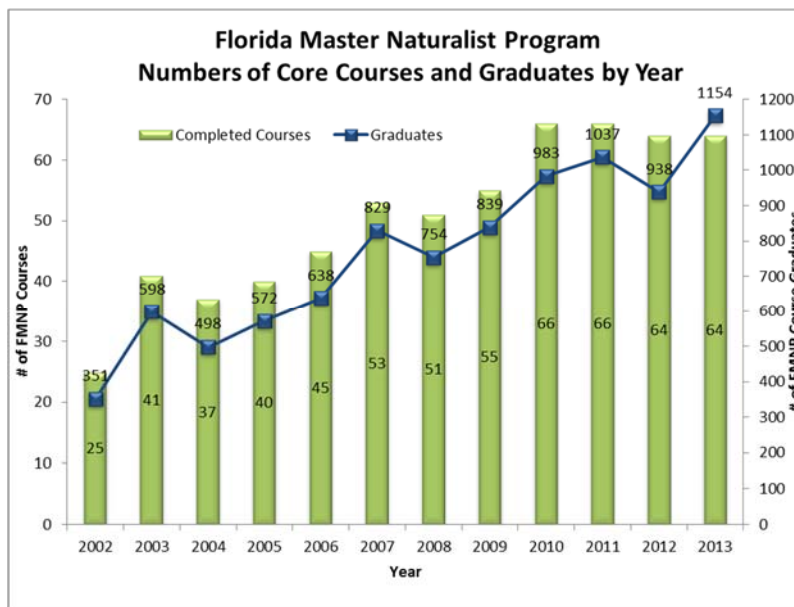


Fig. 1. FMNP courses completed and graduates by year from 2001 to 2013.



**Food Safety and Quality Program (a.k.a. Food Manager Certification)**  
**Dr. Amy Simonne, Professor**  
**Family, Youth, and Community Sciences Department**

Program description

Teaching food safety, food preservation, nutrition and other food related programs in the communities requires rigorous knowledge as well as deep understanding of subject such as food laws and regulations at federal (FDA Food Code), state (FDACS, FDH, DBPR), and at local levels; those knowledge standards can be associated with appropriate licenses or national certifications. Therefore, the main mission of the food safety and quality program is to help the Family and Consumer Sciences county faculty who teaches food safety, nutrition and other food related programs by providing them with a mechanism to maintain professional competency and keep appropriate credentials as a part of risk management strategy for the Florida Cooperative Extension. The county faculty teaching ServSafe® with this program are required to maintain an instructor status as well as continual in-service trainings in order to maintain the aforementioned requirements. As a result the program was able to generate income to supplement the cost of recertification.

The University of Florida IFAS Cooperative Extension Food Safety and Quality Program is celebrating its thirteenth year of offering the ServSafe® curriculum for food manager certification. This program provides food safety training for clientele who need the certification their career and livelihood. In 2014 this program has reached more than 10,000 people with training at manager level through the program since April 2001.

Registration Procedures/Services to the Instructors

We accept registration through the University of Florida – FYCS Department. A part of the registration fees go back to county faculty who participate in the program. These funds may then be used to purchase educational materials or to defer the cost of travel to professional conferences. The program allowed many county faculty members to travel to professional meetings and purchase materials for program enhancement. In order to reduce the operational expenses, the program was moved from the UF-Continuing education in September 2014 to the UF-IFAS-Extension.

The registrations are received by checks, money order or credit cards. Credit card payments are accepted through Eventbrite (since October 2014). The Food Safety and Quality Program Web site (<http://foodsafety.ifas.ufl.edu/>), which is updated regularly, allows public access to the most current training dates and locations, as well as the option to download and print the registration form. In addition, in 2013 a Facebook page was approved by the IFAS-ICS (<https://www.facebook.com/FoodSafetyQualityProgram>). A link to the program coordinator's email address is also available for requesting additional information.

2013-2014 Team Members

Brenda Williams (Alachua County), Marjorie Moore (Bay), Samara Deary (Bradford) Elizabeth Crawford Shephard (Brevard), Jenny Jump (Columbia), Sarah Ellis (Citrus), Natasha Parks (Duval), Mary Keith (Hillsborough), Kristin Jackson (Jefferson), Celia Hill (Lee), Nancy Gal (Marion), Chris Kilbride (Martin), Meg McAlpine (Nassau), LuAnn Duncan (Orange), Gabriela Murza (Osceola), Ada Medina-Solorzano (Palm beach), Betsy Crisp (Pasco), Nan Jensen (Pinellas), Whitney Fung (Polk), Wendy Lynch (Putnam), Katherine Allen, and Catherine Rogers (Suwannee).

**Nutrient Management for Container-Grown Crops: Level 1**  
**Dr. Paul Fisher, Professor**  
**Environmental Horticulture Department**

*What was the course about and who is it aimed at?*

- The basics of essential plant nutrients, fertilizer types, substrate-pH and electrical conductivity (EC). Participants learned how to recognize typical pH and EC problems, select a fertilizer, and conduct an onsite soil test.
- The course was designed for employees who do not have formal training in horticulture. The typical participant was a section grower who has practical experience and is responsible for irrigating and fertilizing greenhouse or nursery crops.
- Lectures and assignments are in both English and Spanish.

*When did the course run?*

- January 2015. Course notes were available online until February 13 to complete any final assignments. The course will be offered again in August 2015.
- There are seven streaming video lessons (each up to 1 hour including discussions), and three assignments (see table below). Total time requirement to complete the course is about 12 hours.
- There was a required pre-test, and a course evaluation at the end.
- Participants could access the lessons and assignments on any day or time during the month of the course as soon as modules appeared as active in the UF Canvas learning environment after Jan 5. The assignments had due dates.

<b>Module</b>	<b>Week</b>	<b>Date</b>	<b>Topic</b>	<b>Activity</b>
<b>1.1</b>	1	Jan 5-9	Overview and common nutrient problems	Pre-test of existing knowledge
<b>1.2</b>	1	Jan 5-9	Supplying essential nutrients	Quiz on common nutrient problems
<b>1.3</b>	2	Jan 12-16	Fertilizer types	
<b>1.4</b>	2	Jan 12-16	Interpreting a fertilizer label	Review fertilizers being used at your location and interpret a label
<b>1.5</b>	3	Jan 19-23	Managing total nutrient level	
<b>1.6</b>	3	Jan 19-23	Acidity and basicity – the importance of pH	
<b>1.7</b>	4	Jan 26-30	Onsite testing of pH and EC	Test the pH and EC of samples from your location, and interpret results. Final course evaluation.

*Who was eligible to take this course and how much did it cost?*

- This was a trial offering of the course, so it was not yet publicly available. It was limited to employees of Floriculture Research Alliance partners (see floriculturealliance.org), and UF IFAS Extension faculty. There was no registration cost for eligible participants (because their companies already donate at least \$5000 to my program at the university, which supports my research and extension program and has brought in around \$1M in funding).
- Now that we have run the pilot, the course will be offered to the public for a fee (\$200) in August 2015. I think that is what the market will bear based on discussions with several growers, and is close to cost of an off-book undergraduate credit for comparison. That fee is handled within the UF QuickReg process. Fees go into a PeopleSoft account. The fees then get distributed after the course depending on the policy of the managing unit (in our case, the Environmental Horticulture Dept.). This will go towards my extension account and salary for Rosanna Freyre (research faculty) or Brian Pearson (lecturer, for his course).
- We see the international and Spanish language audience to have huge potential. To reach them, we need partners.

- We will therefore be offering 20% discounts (loyalty coupon) or commissions (marketing incentive) to organizations who recruit at least 10 students each. For example, I will be giving a presentation to the New Zealand International Plant Propagator's Society conference in April – if they promote our UF course to their members, they can directly access clients we cannot. We want to make it in their interest and in the process increase our impact and revenue.

#### *How did participants register?*

- Each employee was registered separately so that they receive their own University of Florida ID number through QuickReg, and their work was tracked individually. This was actually a challenge, because (a) some employees did not have emails before the course, so their managers had to create email addresses for them, and (b) the UF password restrictions drove several people crazy. 110 Floriculture Research Alliance employees registered, and 76 completed the course.
- UF IFAS Extension faculty also registered as an in-service training at <http://pdec.ifas.ufl.edu>. 10 registered, and 6 completed the course.

#### *How were participants able to contact the instructors?*

- Via email any time, and by chat from within Canvas Tuesdays and Thursdays from 2.30 pm to 4.30 pm US Eastern Time during January. Our next challenge will be to increase interactivity, but feedback from participants was that access to instructors was fine.

#### *Was there a university credit, qualification, or certificate?*

- When participants completed the requirements for the course, we sent them a customized certificate of completion designed by UF/IFAS Communications (see attached example).
- The course did not count for credit towards a university degree. We will offer the course again in August 2015 where undergraduates will also be able to enroll for credit (but will need to add more hours of instruction to equal a full credit).

#### *Some observations and feedback*

- 120 enrolled, and 82 completed the course. 18% of the participants selected Spanish language delivery. We offered the course in January, and I think the main reason some people did not finish was because the production peak began in February. But we were very happy with the number of growers and allied professionals that finished and the feedback received. We documented increased knowledge, and participants were motivated to try other courses. The registration process and online delivery went smoothly, and the only challenge was that some participants did not previously have email addresses or had challenges with the passwords. I think we achieved our goal of reaching clients who lacked formal horticulture training, and who would not normally be sent to face to face workshops.
- Priorities for future courses identified by participants: 38% advanced nutrient management; 19% disease management; 16% plant growth regulators and flowering/growth control; 12% general pest management and biological control.
- Our next course offerings (all bilingual and online) will be:
  - June 2015 - Fundamental Commercial Plant Production Techniques – offered by Brian Pearson and Rosanna Freyre to public (this is adapted from Brian's Apopka face-to-face course)
  - August 2015 - Nutrient Management for Container-Grown Crops (Level 1) – repeat of January course, offered by Paul Fisher and Rosanna Freyre to public, and UF undergraduate students
  - September 2015 - Nutrient Management for Container-Grown Crops (Level 2) – pilot to FRA, offered by Paul Fisher and Rosanna Freyre as extension in-service, graduate level
- We will be offering the first two of these courses for a base price of \$200, and will be marketing the courses with industry partners.
- There are lots of other future possibilities. Disease management and plant growth regulators are clearly popular and will need other team members. By the end of fall this year we will have a very clear idea of the path forward.

## **Appendix 7**

### **Extension Publications**

Publications and other educational materials developed and/or paid for with federal or offset funds (e.g., state and county tax funds) are subject to federal regulations administered by USDA. Although each state is encouraged (to the extent possible) to provide publications and materials without charge, it is permissible to recover costs related to reproduction, mailing, and handling. New publications that are part of grant-funded programs should include a budget that reflects the true cost of publications development, e.g., design, editing, printing, and distribution, when appropriate.

UF/IFAS has both free and for-sale (cost recovery) publication programs. State and federal funds are allocated to support our free extension publications program. We recommend expanding the cost recovery program to include all true costs associated with publication distribution, including salaried position(s).

UF/IFAS's free publications program will continue to support providing a single copy of any non-cost recovery publication requested by an individual, group, or business within Florida. The cost for all publications used in educational programs should be covered through registration fees whenever appropriate. However, faculty and staff shall be required to recover costs for extension publications used in conjunction with fee-based programs and grant or contract activities. Publications required for emergency response and extension-sponsored programs will continue to be made available without charge.

It is recommended that we handle our for-sale publications through the UF/IFAS Bookstore's centralized system of inventory control, distribution, and accounting.

**Appendix 8**  
**Lessons Learned from Texas A & M's Revenue Enhancement Effort**  
**Doug Steele, TAMU AgriLife Extension Director**

(Note: TAMU Extension refers to itself as an "agency.")

- The terms “partial cost recovery” or PCR, will no longer be used. Instead, we will use Fee Based Programs. Using familiar terms will support clear communication with stakeholders and program participants.
- Generation of registration fees, or grant funding (both valued), should not drive the creation of programs. Issues critical to our stakeholders should drive high quality, relevant programs.
- Program fees will continue to be an important source of revenue for the agency. If adequate fees are generated, Senior Administration is committed to investing some of this revenue to support the development of new outreach methods and innovative program development to advance the agency.
- Regional Program Leaders have been asked to lead agent/specialist teams in planning, implementing, and evaluating some high-impact, high-visibility, regional programs in 2015. These programs will have potential to generate fees, as well as increase agency impact.
- When viable, County Extension Agents should continue to charge registration fees for county programs and submit fees using the current procedures.
- Grants are a viable and important source of funding for program delivery. We recognize that in some cases, grants do not allow for registration fees to be collected; this should not dissuade the pursuit of grant funding.
- Partnerships play a critical role in helping us fulfill our mission and bring additional resources to programs. Expectations for fee based programming should not inhibit the creation of partnerships that enhance programs.
- Members of the Central Leadership Team should work with Extension educators to determine if programs should be fee based, as well as provide guidance on fee structure for specific programs.