

Oklahoma Proven: A Plant Evaluation and Marketing Program

Louis B. Anella, Michael A. Schnelle, and Dale M. Maronek

ADDITIONAL INDEX WORDS. plant evaluation, marketing, trials

SUMMARY. Oklahoma Proven is a plant evaluation and marketing program developed by the Department of Horticulture and Landscape Architecture at Oklahoma State University. An advisory committee comprised of representatives from state agencies, industry, and Oklahoma Botanical Garden and Arboretum Affiliate Gardens makes plant recommendations to an executive committee which in turn selects one tree, shrub, perennial, and annual for promotion each year. Trees and shrubs are selected 3 to 5 years ahead of promotion while perennials and annuals are selected 1 to 2 years in advance to give nurseries time to increase production. Marketing includes posters, billboards, pot stakes, and hang tags with the Oklahoma Proven logo and related extension service programming and news coverage. Consumers appreciate having help selecting plants and one retail nursery reported an 81% increase in sales of Oklahoma Proven plants. Funding for the program is provided by industry, Oklahoma Agricultural Experiment Station, Oklahoma Cooperative Extension Service, and a grant from Oklahoma Department of Agriculture.

Gardening can be difficult in Oklahoma. Hot summers, heavy soils, and desiccating winds challenge even a talented gardener and can quickly discourage a novice. Proper plant selection is always important, but it becomes imperative as growing conditions become more severe. Unfortunately, mass merchandisers provide an array of plant material that is not always appropriate for local conditions and unsuspecting consumers purchase plants that will languish without special care. Environmentally conscious consumers request plants that are pest-free and require little maintenance. Plant evaluation and marketing programs have been initiated to identify and promote plants that meet consumer demands (Parsons et al., 1991; Arnold et al., 1998). Oklahoma Proven (OKP) is one such program that was launched in 1999 to help the consumer achieve greater gardening success and increase sales for Oklahoma's green industries. Oklahoma Proven was developed by the Department of Horticulture and Landscape Architecture at Oklahoma State University (OSU) and it promotes plants that are appropriate throughout Oklahoma, readily available in the trade, pest free, non-invasive, and profitable for industry to produce. Sponsors of the program and other entities involved are listed in Table 1.

Department of Horticulture and Landscape Architecture, Oklahoma State University, 360 Agricultural Hall, Stillwater, OK 74078.

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Table 1. Current sponsors of Oklahoma Proven plant evaluation and marketing program.

Department of Horticulture and Landscape Architecture, Oklahoma State University
Oklahoma Botanical Garden and Arboretum
Oklahoma Cooperative Extension Service
Oklahoma Agricultural Experiment Station
Oklahoma Department of Agriculture
Oklahoma Nursery and Landscape Association
Oklahoma Greenhouse Growers Association
Individual industry contributors

The mission of OKP is to enhance the profitability of Oklahoma green industries (wholesale and retail) by evaluating and promoting plant material suited to Oklahoma growing conditions. This mission is accomplished through the following objectives:

- Help consumers choose plants appropriate for Oklahoma by marketing proven plants selected from the evaluation program.
- Evaluate new cultivars, introduced species, and native plants for commercial production and use in Oklahoma landscapes with trials at OSU, cooperating Oklahoma Botanical Garden and Arboretum (OBGA) Affiliate Gardens, and cooperating nurseries.
- Identify underused plants already in production by surveying the OKP advisory committee.

Organization and management

The daily operations of OKP are managed by faculty and staff in the Department of Horticulture and Landscape Architecture at OSU. The OKP management team is comprised of three faculty members who serve as director, plant evaluation coordinator, and marketing coordinator with technical assistance provided by staff. The director is responsible for the overall operation of OKP with specific responsibilities in fund raising and appointment of the executive and advisory committees. The plant evaluation coordinator evaluates plants, supervises evaluators throughout the state, and manages data collection (see plant evaluation section below). The marketing coordinator manages the creation and distribution of marketing materials and media promotion (see marketing section below).

Two committees were formed to assist the management team with plant selection and to bring the perspective and expertise of the green industry to OKP. The advisory committee is the

larger of the two and was organized by inviting a broad range of horticulture professionals to meet annually to recommend plants for promotions to the executive committee. The advisory committee is comprised of approximately 40 professionals from the following sectors of the horticulture industry in Oklahoma: OBGA Affiliate Gardens, cooperative extension, retail nurseries and garden centers, wholesale nurseries and greenhouses, education, and horticultural societies. In addition to recommending plants to the executive committee, the advisory committee assists the management team with decision making by bringing a broad wealth of knowledge to the annual meeting.

The executive committee is comprised of the OKP management team, two representatives each from the wholesale and retail industries, and three *ex officio* members from the OSU Department of Horticulture and Landscape Architecture faculty. Executive committee members are invited to serve by the OKP director. The primary function of the executive committee is to make the final OKP selections from suggestions forwarded by the advisory committee.

Since OKP has been in existence for only 2 years, and since thorough plant evaluations take time, plants presently considered for promotion came from suggestions made by advisory committee members. When the evaluation program reports results, plants passing the evaluation criteria will be given the highest priority for promotion. To initiate the program, OBGA Affiliate Garden representatives were asked to suggest plants they knew would thrive in Oklahoma but perhaps were not well known by consumers. These suggestions were placed on a ballot and the ballot was printed in Oklahoma Nursery and Landscape Association (ONLA) and Oklahoma Greenhouse Growers Association (OGGA) newsletters. From these ballots, the advisory committee derived

its first recommendations and the executive committee its first OKP selections. In the future, the advisory and executive committees will meet once a year to recommend and select plants for promotion.

Funding

Funding for OKP comes from various sources. Faculty salaries are supported by the Oklahoma Cooperative Extension Service and the OSU Agricultural Experiment Station. Marketing has been funded through cash donations by individual nurseries and through a grant from the Oklahoma Department of Agriculture (ODA) Market Development Services. In 1999 the marketing program was funded by a donation from an individual nursery. In 2000, a \$7500 matching grant from ODA in addition to cash donations from industry allowed the marketing and plant evaluation programs to be expanded to include free marketing materials (posters and billboards) distributed to all retailers statewide.

Pot stakes and hang tags were designed to both market plants and generate income for OKP. Specifications for pot stakes and hang tags were bid with the requirement that a five cent surcharge be added to the price and returned for ongoing support of the OKP program. Wholesalers and retailers order pot stakes and hang tags directly from the printer, relieving the OKP management team from taking orders and distributing these marketing materials. The OKP program management team committed to purchasing unsold pot stakes and hang tags but maximum numbers of stock to be purchased were set in the bid.

In-kind donations are another important funding source for the OKP program. Plants have been donated by various nurseries and time and resources have been donated by OBGA Affiliate Gardens to perform plant evaluations. ONLA and OGGA have each donated space in their newsletters for announcing OKP selections and program news. Each year, *Oklahoma Gardening*, a public television program produced by OSU's Department of Horticulture and Landscape Architecture, airs segments about OKP selections.

Marketing efforts

Plant evaluation programs become valuable to the consumer and industry when the results are marketed

Table 2. Timeline for development and distribution of Oklahoma Proven (OKP) marketing materials.

Spring before year of promotion
Photograph plants for promotion
Hold executive committee meeting to make final OKP selections
Summer before year of promotion
Coordinate design of marketing materials with the Department of Agricultural Communications, Oklahoma State University
Publicize the executive committee's final OKP selections for upcoming years to wholesalers and retailers through industry newsletters
Complete all designs by the end of August
Fall before year of promotion
Announce bids for printing marketing materials
Print marketing materials
Winter before year of promotion
Display, distribute, and sell marketing materials at January nursery and greenhouse industry trade shows
Mail undistributed marketing materials to retailers
Distribute press release for mid-March marketing campaign
Make digital images or slides of OKP plants available to the media
Produce and distribute an OKP slideshow to extension educators
Spring of promotional year
Promote OKP on <i>Oklahoma Gardening</i>
Promote OKP at plant material conferences, garden shows, plant sales, Oklahoma Botanical Garden and Arboretum Affiliate Gardens, etc.
Promote OKP on television news programs and other major news outlets as the opportunity permits

directly to the consumer. Oklahoma Proven has targeted the gardening public with its marketing campaign through point-of-purchase materials and through traditional media outlets. Table 2 presents a timeline for development and distribution of OKP marketing materials. Point-of-purchase materials in 1999 were paper posters and in 2000 the point-of-purchase materials were expanded to include posters, billboards [7 × 11-inch (17.5 × 27.5-cm) signs] for each plant, hang tags, and pot stakes. The posters were printed on 0.012 mil [1.2×10^{-5} inch (3.0×10^{-5} cm)] styrene, making them weatherproof and more useful to retail nurseries with the billboards, hang tags, and pot stakes also printed on a weatherproof vinyl plastic. The marketing materials and OKP logo were designed by Agricultural Communications Services at OSU.

The target date each year for launching the marketing campaign is mid-March. The marketing campaign includes the point-of-purchase materials discussed above and press releases to major media outlets, cooperative extension educators, industry newsletters, and promotion on *Oklahoma Gardening*. Oklahoma Proven has been promoted by county extension educators, industry, and academicians involved with the program and has also been well received by major news outlets in the state. Oklahoma Proven has been featured on television news programs in Oklahoma, in newspaper gardening and home sections, and at least

one national consumer publication. A timeline for the development and distribution of marketing materials is presented in Table 2.

Retailers and wholesalers are an important component of the marketing strategy and have been asked to contribute in the following ways:

Retailers

- Hang OKP posters and billboards in a prominent location
- Create display space specifically for OKP plants
- Include the OKP logo in print advertising with the statement, "We sell Oklahoma Proven Plants"
- Suggest plants for future promotion or evaluation
- Donate plants for evaluation

Wholesalers

- Purchase OKP pot stakes and hang tags
- Include the OKP logo in wholesale catalog
- Suggest plants for future promotion or evaluation
- Donate plants for evaluation

Selection and evaluation

Since plant evaluation takes time, OKP selections for the first few years of the program resulted from surveying the advisory committee for underused plants. Once the evaluation program has data from several growing seasons and can make recommendations, the advisory committee will give plants that passed the evaluation process high-

est priority for selection and marketing. Whether plants are recommended by surveying the advisory committee or by passing the evaluation process, the criteria for selection are the same:

- Appropriate throughout much of Oklahoma
- Readily available in the trade
- Limited cultural input required, i.e. few pest or disease problems, tolerant of Oklahoma's diverse soil types and weather conditions
- Noninvasive
- Propagation is economically feasible and can be profitably produced

The OBGA Headquarter Garden at OSU, Stillwater is the principle test site for the OKP program. Other test sites include OBGA Affiliate Gardens (at present there are 16 Affiliate Gardens that are potential test sites) and participating wholesale and retail nurseries. Herbaceous plants are evaluated for a minimum of 3 years, woody plants are evaluated for a minimum of 5 years and plants are evaluated in at least one site in each of three regions of Oklahoma (west, central, and east) (Table 3).

Evaluation data are gathered by investigators at each test site and forwarded to the OKP plant evaluation coordinator. The plant evaluation coordinator assembles the data and makes recommendations to the OKP advisory committee as to which plants merit promotion. A determination is made about the time required to produce the plant in numbers sufficient

Table 3. Herbaceous and woody plant trial protocols for the Oklahoma Proven (OKP) program.

Plant(s) is/are recommended for trials by OKP advisory committee.
 Recommended plant(s) is/are planted out for initial trials.
 Any plant that shows promise after year one is trialed the next year at a minimum of one site in each of three regions of Oklahoma (west, central, east) with a minimum of three plants per site.
 Data is taken quarterly using standardized data forms from all trial sites and submitted annually to the plant evaluation coordinator.
 A judgment is made on the plant's merit for inclusion in OKP after a minimum of 3 and 5 years of evaluation for herbaceous and woody plants, respectively.
 Any plant that meets the above multiyear trial period is submitted to appointed industry members for thorough propagation studies.
 Any plant that meets cultural and propagation criteria is forwarded to the advisory committee for recommendation to the OKP program.

for promotion. After that determination, each plant is assigned to a future year for promotion. Recommendations are then forwarded to the executive committee that makes the final selections. A synopsis of the plant trial process is outlined in Table 3.

Potential obstacles

Oklahoma Proven has been well received by industry and the gardening public; however, several potential obstacles must be overcome or circumvented with such a program.

Oklahoma Proven as a marketing and plant evaluation program does not fit easily into the traditional roles of an academic institution. Plant trials have been performed by horticulture researchers for many years, but may not always lead to publications in refereed journals.

The marketing aspects of OKP are entrepreneurial in nature. For example, the OSU logo can be printed only by licensed printers yet none of them had the capacity to print on styrene. This problem was solved by contracting with a licensed printer who subcontracted with another printer capable of printing on styrene and by omitting the OSU logo from some marketing materials. As a result, both monetary and public relation costs to the university occurred.

A constant struggle for plant promotion programs is balancing the desire to introduce new and underused plants of limited availability with established plants already available in large numbers. Oklahoma Proven selections are

marketed to hundreds of thousands of consumers, so if even a small percentage of consumers buy OKP plants, supply may be insufficient. The OKP executive committee is charged with making sure that supply is adequate, or can be adequate by the time the plant is promoted. This issue often leads to spirited debate at committee meetings before the situation is resolved.

Since the selection process is not completely objective, personal preference also leads to disagreement. Still (2000) acknowledged a similar problem with selection of the Perennial Plant of the Year by commenting, "I have had to replace all the windows in our office due to the 'letter bricks' that have been thrown in regards to the plant choices." The letter bricks ranged from, "boring and overused plants," to "It is about time you offered selections that are tried and true performers." This form of criticism may not be avoidable but it does make managing plant promotion programs exciting! See Table 4 for a listing of OKP selections.

Conclusion and outcomes

Consumers seem pleased to have assistance choosing plants appropriate for their gardens and retailers report anecdotal evidence that OKP is increasing sales. Retailers report that having the endorsement of OSU and industry helps sell OKP plants but that displaying the OKP poster and billboards with photographs is most helpful. Although no controlled experiments were per-

formed, one nursery reported a 117% increase in units sold and an 81% increase in revenues when comparing 1998 to 1999 sales for OKP plants promoted in 1999 (J. Schulte, personal communication). The impact on sales was greater for herbaceous plants than for woody plants. Sales (units) of purple fountain grass (*Pennisetum setaceum* 'Rubrum') increased 116% and 'Powis Castle' artemisia (*Artemisia arborescens* x *A. absinthium*) increased 228% while sales of oak-leaf hydrangea (*Hydrangea quercifolia*) and chinese pistache (*Pistacia chinensis*) increased 53% and 26%, respectively.

Marketing studies have not been performed; however, the OKP management team anticipates such studies in cooperation with agricultural economists and industry leaders to assess the economic impact of the OKP program.

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Table 4. Oklahoma Proven Selections for 1999, 2000, and 2001.

Year	Tree	Shrub	Perennial	Annual
1999	Chinese pistache (<i>Pistacia chinensis</i>)	Oak-leaf hydrangea (<i>Hydrangea quercifolia</i>)	'Powis Castle' artemisia (<i>Artemisia arborescens</i> x <i>A. absinthium</i>)	Purple fountain grass (<i>Pennisetum setaceum</i> 'Rubrum')
2000	Bald cypress (<i>Taxodium distichum</i>)	'Magic Carpet' spirea (<i>Spiraea japonica</i>)	'Homestead Purple' verbena (<i>Verbena canadensis</i>)	Fan flower (<i>Scaevola aemula</i>)
2001	Shumard oak (<i>Quercus shumardii</i>)	Deciduous holly (<i>Ilex decidua</i>)	'Siskiyow Pink' gaura (<i>Gaura lindheimeri</i>)	Mexican zinnia (<i>Zinnia angustifolia</i>)