

Enhancing the Capacity to Create Behavior Change: Extension Key Leaders' Opinions about Social Marketing and Evaluation

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Abstract

Extension educators endeavor to create and measure outcomes beyond knowledge gain. The purpose of this qualitative study was to explore the role of social marketing as a method for creating behavior change within the University of Florida Extension system through key leader opinions. Additionally, the study sought to identify perceptions about program evaluation and training needs related to this area. Semi-structured interviews were conducted with key leaders at the local, regional, and state levels within Florida Extension. Overall, the participants saw great potential in applying social marketing to Extension programming, and identified knowledge, resources, and terminology as key barriers to Extension agents' adoption of this approach. In discussing program evaluation related to behavior change, the key leaders expressed strong interest in the creation of standardized evaluation tools and the provision of professional development training to support social marketing and evaluation competencies. The interviews revealed substantial confusion between the terms social marketing and social media. A recommendation is made to revisit the term social marketing within Extension, and for educators to consider alternate terminology to eliminate confusion. Implications of the study point to the development of training opportunities that empower Extension professionals to encourage and evaluate behavior change. It is suggested that Extension professionals are already employing many elements of social marketing. Finally, a blending of the Conceptual Programming model with the social marketing process is discussed as a means of structuring Extension program planning when using social marketing.

Keywords: Social marketing, behavior change, key leaders, program evaluation, professional development, Extension, needs assessment, barriers, benefits

Extension's ability to create and demonstrate real change in their clientele is the key to accountability and funding. Extension professionals have been encouraged to incorporate behavior changes and Social, Economic, and Environmental (SEE) conditions, the strongest levels of program outcomes (Rockwell & Bennett, 2004), into their evaluation plans. Extension educators should focus on these higher-level outcomes when seeking to make changes in their community, as knowledge-based approaches have not proven to be strong conduits to creating behavior change (Frisk & Larson, 2011). As such, Extension professionals should concentrate on behavioral objectives and behavior change techniques over knowledge gain and solely informational approaches when planning and implementing programs (Clements, 1999; Pratt & Bowman, 2008). Social marketing has been documented as an "attractive alternative to information-intensive campaigns" (McKenzie-Mohr, 2011, p. 8).

There is substantial evidence that social marketing is an effective strategy for creating behavior change (McKenzie-Mohr, Lee, Schultz, & Kotler, 2011; Rogers, 2003). The social

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marketing strategy has been used to encourage behavioral changes related to many community issues including recycling, water and energy conservation, childhood obesity, public health initiatives, and waste reduction (Andreasen, 2006; Kotler & Lee, 2008; Lee & Kotler, 2011; McKenzie-Mohr, 2011). A review of the literature reveals much success in using social marketing techniques to encourage behavior change. However, there is a relatively modest amount of current literature that documents the application of social marketing to Extension programs, despite the fact that this approach to programming has been deemed as highly applicable to Extension and adult educational efforts (Skelly, 2005).

Social marketing is a distinct discipline that borrows principles from traditional marketing and social psychology and applies them to influencing an audience's behavior to benefit both the community and the audience members (Kotler & Lee, 2008; McKenzie-Mohr, 2011; McKenzie-Mohr et al., 2011). Recently, the European Social Marketing Association, the International Social Marketing Association, and the Australian Association of Social Marketing provided a consensus definition:

Social Marketing seeks to develop and integrate marketing concepts with other approaches to influence [behaviors] that benefit individuals and communities for the greater social good. Social Marketing practice is guided by ethical principles. It seeks to integrate research, best practice, theory, audience and partnership insight, to inform the delivery of competition sensitive and segmented social change [programs] that are effective, efficient, equitable and sustainable. (Lefebvre, 2013, para. 1)

While many definitions of social marketing exist, they share a number of key principles. Social marketing: endeavors to change behavior for individual and community good as opposed to profit; targets a segmented group within a larger population; uses research to understand the audience and define its perceived barriers and benefits; and creates behavior change through a number of tools (Andreasen, 2006; Kotler & Lee, 2008; McKenzie-Mohr, 2011; McKenzie-Mohr et al., 2011).

Social marketing is a comprehensive strategy that can guide programming, and its strong focus on an audience's needs makes it highly relevant to Extension. A key characteristic of social marketing is that the behavior changes it produces must be beneficial to the community and the individuals who live there, in contrast to commercial marketing where profit is often the goal (Lee & Kotler, 2011). Practitioners applying this approach select a target audience and then identify specific behavioral objectives that are desired outcomes of a program (Lee & Kotler, 2011). Social marketing uses audience segmentation, recognizing the "likelihood that they will clump together in meaningful ways" (Andreasen, 2006, p. 105), and therefore targets a key segment or segments of a population with focused messaging developed based on the unique attributes of the audience. Social marketing objectives might dictate that the audience accepts a new behavior, modifies or discontinues an existing behavior, or rejects a potential future behavior (Lee & Kotler, 2011). Research-based needs assessments are used to better understand the unique set of audience's perceptions surrounding the desired behavior, what may prevent them from making the change, and what might encourage the change (McKenzie-Mohr et al., 2011). This research may be comprised of some combination of focus groups, interviews, surveys, observations, publicly available data, and other forms of data collection (McKenzie-Mohr et al., 2011). This research provides the practitioner with a clear understanding about how an audience feels about a system or activity, what behaviors are currently competing with the desired behavior, and the barriers and benefits they see to making specific behavioral changes. This information forms the foundation of a marketing mix or strategy, incorporating product, price, place, and promotion (4Ps), another element borrowed from traditional marketing (Lee & Kotler, 2011).

The tools that can be used as part of a comprehensive social marketing strategy include using communications, incentives, disincentives, commitment, prompts and reminders, social diffusion, and emphasis of social norms (Andreasen, 2006; Kotler & Lee, 2008; Lee & Kotler,

2011; McKenzie-Mohr, 2011; McKenzie-Mohr et al., 2011). As a step in the social marketing process, pilot testing is typically conducted with a smaller segment of the intended audience to ensure effectiveness prior to broader implementation and evaluation (McKenzie-Mohr, 2011).

Extension is said to be “one of the world’s most successful change agencies” (Rogers, 2003, p. 391) and a major purpose of the Extension model is to solve individual problems at the local level, delivering solutions in the form of research-based information (Cooperative State Research, Education, and Extension Service, n.d.). Congruently, social marketing intends to benefit the community by using an understanding of the clients’ needs, perceptions, and preferences to encourage positive behavior changes.

While social marketing has been identified as a promising process for creating behavior change (Rogers, 2003), it is still underutilized within Extension. Further, the evaluation and the reporting of outcomes and impacts resulting from behavior change programming remains critical in demonstrating the value of Extension programming to clients and stakeholders.

Behavior change is key to the full circle of programming activities, from program planning and implementation through the evaluation process. This study was conducted to explore the perceived role of social marketing and related evaluation activities in the context of Extension-encouraged behavior change.

Purpose and Objectives

The National Research Agenda from the American Association for Agricultural Education has acknowledged that outreach activities must continually evolve to serve changing consumer behaviors and emerging technologies (Doerfert, 2011). Particularly, the National Research Agenda recommends a focus on determining the “knowledge, skills, and support systems that facilitate decision-making and adoption processes by individuals and groups” and identifying “potential gaps in knowledge ... and other factors that constrain effective communication and education efforts to various target audiences” (Doerfert, 2011, p. 8). Furthermore, the National Research Agenda recommends identifying the factors that influence change processes and outcomes in order to encourage positive community transformations (Doerfert, 2011).

The purpose of this study was to explore and document University of Florida Extension key leaders’ opinions related to the use of social marketing and evaluation of programs intended to lead to behavior change. Further, the study explored perceived barriers to adopting social marketing techniques and documented training needs related to encouraging behavior change. The findings of this study are intended to frame future educational offerings. The objectives that guided this study included the following:

1. Describe University of Florida Extension key leaders’ opinions towards the use of social marketing in creating behavior change.
2. Describe University of Florida Extension key leaders’ opinions towards the current methods for evaluating behavior change.
3. Capture and document University of Florida Extension key leaders’ suggestions for improving these areas.

Methods

The conceptual framework that guided this study was Boone, Safrit, and Jones’ Conceptual Programming Model (2002). This model illustrates the programming process in adult education. Basic assumptions made by this model include the following: the ultimate goal is change in behavior in the adult learner, learning is a decision-making process, programming is a collaborative effort, and adult educational programming is an interrelated system (Boone et al., 2002). This model organizes educational programming into three critical processes: planning,

design and implementation, and evaluation and accountability. The planning process is intended to maintain collaboration with the target learners and their “leader and stakeholder groups in collaborative identification, assessment, and analysis of their educational needs” (Boone, et al., p. 76). The ability to connect with one’s target audience “requires that adult educators, as change agents, identify closely with the formal and informal leadership of that [audience]” (Boone et al., 2002, p. 132). For this reason, the key leader approach to program planning is an ideal strategy for uncovering the needs of an educational organization.

This study was conducted using semi-structured interviews with key leaders in the Florida Extension system. The perspective of constructivism guided this study in that the focus was meaning-making in the mind of the researcher (Crotty, 2003). Interviews with key leaders in the UF/IFAS Extension system were used by the researcher to develop a deep understanding of the topic (Crotty, 2003; Yilmaz, 2008).

Interview questions were developed and then submitted to a panel of expert qualitative researchers with experience in social marketing techniques and Extension for review. The panel’s revisions and modifications were incorporated into a final interview guide. This guide was used to ensure that the same lines of inquiry were explored in each interview while allowing meaningful conversation to build around each topic (Patton, 2002). The questions that were used to guide the interviews included “What do you know about social marketing?”; “Should the role of social marketing change in Florida Extension?”; “What do you see as the barriers to Extension’s use of social marketing principles?”; “How would you like to see Extension evaluation change?”; “What would motivate Extension agents to adopt these changes?”; and “What do you see as the barriers to making these changes?”. A neutral approach to the discussion was used to develop rapport (Patton, 2002). The questions served as talking points for more in-depth conversation; as ideas were discussed, follow-up questions were asked of participants based on their responses.

Interview Protocol

Most of the interviews were held either in person or through video conferencing in order to develop rapport and allow for observation of participants’ reactions. One interview took place by telephone in order to accommodate the needs and comfort level of the participant. No specific time constraint was specified, and key leader interviews ranged from 45 to 60 minutes in length based on how much participants shared about the topic (Patton, 2002). Participants were assigned an alphanumeric code and later a pseudonym in order to maintain confidentiality. A meaningful interview was facilitated through the use of an organized interview plan, entering the dialogue conversationally, allowing for spontaneity of the respondent, and using a terminology that was mutually understood (Erlandson, Harris, Skipper, & Allen, 1993).

Prior to commencing this study, this research protocol was reviewed and approved by the University of Florida Institutional Review Board (Protocol #2013-U-1113).

Key Leader Identification

Boone et al. (2002) recommend combining at least two methods of key leader identification, and therefore this study incorporated the positional approach paired with the reputational approach. The *positional* approach identifies leaders who are in stations of formal authority, such as administrators. The *reputational* approach employs well-informed members of a population to identify leaders who are active in decision-making.

To identify key leaders through the positional approach, a statewide directory was consulted and a list of leaders was developed based on formal rank within the Florida Extension system. To identify key leaders through the reputational approach, 12 individuals were randomly selected from a pool of all state and county personnel with Extension appointments and asked to identify

persons within the Florida Extension system who exhibited the following qualities (Boone et al., 2002):

- make decisions and/or influence decision-making within the Florida Extension system;
- are well-respected within the Extension community at the local and/or state level;
- adhere to standards that reflect the principles, ethics, and values of the Florida Extension system overall; and
- engage in community events and/or social issues.

The key leaders that emerged on both lists comprised the pool of potential interview respondents. This pool included county and district Extension directors, upper administration, and state and county Extension faculty. The leaders were ranked based on their formal position and frequency of which they were identified by the reputational approach. The aim was to interview leaders who represented local, regional, and state levels of leadership. The positional approach yielded a list of 146 individuals and the reputational approach yielded 37 individuals. There were 26 individuals who emerged on both lists. These were considered the pool of key leaders for the study. The 26 key leaders were prioritized using their formal position and the number of times their names were identified during the reputational approach. A sample size was not established prior to this qualitative study (Dooley, 2007). The objective was to conduct as many interviews as were needed to reach *data saturation*, or a point of recurrence (Lincoln & Guba, 1985). As such, interviews were conducted with key leaders until data saturation was confirmed, which occurred after six interviews had taken place.

Data Collection and Analysis

Field notes were collected during the interviews, and used to reconstruct the dialogue afterwards. To ensure rigor and trustworthiness, reflections were made, additional notes were taken, and data were clarified immediately after each interview (Patton, 2002). The data collected during the interviews were analyzed using the *constant comparative method* (Lincoln & Guba, 1985). When conducting this type of data analysis, “[t]here is a continual interplay between the researcher, his or her data, and the theory that is being developed” (Fraenkel & Wallen, 2008, p. 429). The constant comparative method includes three major stages. First, line-by-line coding was conducted and draft names were assigned to categories; second, individual categories were intensely analyzed; finally, core themes were developed using specific criteria (Dooley, 2007).

Credibility and trustworthiness were established by conducting peer debriefings and by including study participants in a review of the research findings (Lincoln & Guba, 1985). During the interviews, member checking was conducted to verify accuracy of written notes. Member checking shifts the validity procedure to the participants (Creswell & Miller, 2000) and has been considered “the most crucial technique for establishing credibility” (Lincoln & Guba, 1985, p. 314). In addition to conducting member checks during the interviews, the raw data and aggregated emerging themes were shared with participants following initial data analysis. Participants were asked to comment on accuracy to ensure that the overall findings were accurate and realistic (Creswell & Miller, 2000). This method provides credibility to the study by allowing participants to react to both the data and the final findings (Creswell & Miller, 2000). Finally, experts not associated with the study were engaged in a peer debriefing to further establish credibility. Peer debriefing is a process where professionals who are knowledgeable about the topic and external to the immediate study are consulted for feedback related to the data analysis and insights emerging from the research (Erlandson, et al., 1993). This valuable process can help to improve the analysis and redirect it when necessary. The individuals selected to conduct the peer debriefings are experts in behavior change and program evaluation.

Findings

A number of core themes emerged related to the study's three objectives.

Describe University of Florida Extension key leaders' opinions towards the use of social marketing in creating behavior change. (Objective 1).

Social Marketing- Underused and Misunderstood. The interviews were initiated with discussion about what each interview participant knew about the topic, purposefully excluding a detailed description of social marketing. The term *social marketing* was confused with *social media* by each one of the interview participants. Despite the fact that each individual ultimately did have some level of knowledge about social marketing prior to their interview, each began speaking about social media platforms when asked what they knew about social marketing. Before proceeding further with the interviews, a thorough description of social marketing was provided to each respondent to clarify the context. After receiving the description, each participant exhibited varying knowledge about social marketing, and each had at least minimal understanding of the approach. Much discussion related to issues with terminology followed the clarification.

Comprehensive social marketing campaigns are used minimally in Extension, but this approach has great potential for many programmatic areas. Certain principles of social marketing are already being used throughout Extension. Helene said "I believe we are using elements of social marketing already". Subject Julia said "social marketing is used by Extension to an extent in that our advisory committees help us to identify needs ... and in that we use clients to plan programs based on needs". One subject also referenced the Florida Extension Roadmap, which was developed based on substantial input from target audience members and stakeholders.

There are a number of individual elements of social marketing being used within Extension without the intention to conduct complete social marketing campaigns. Subject CA3 described the social marketing strategy as having "tremendous potential" for Extension, and thought that Extension was currently only "playing on the fringes" of this approach. This respondent elaborated on specific initiatives being used to program to segmented audiences within the Florida Extension system. After the social marketing approach was explained in greater detail, much discussion covered the applicability of the social marketing model to Extension programming. The two are inherently compatible.

Barriers and Benefits to the Use of Social Marketing in Extension. Knowledge is one of the most prominent barriers to the potential use of social marketing within Extension. Most Extension agents do not currently have the understanding needed to use social marketing. Extension faculty are trained and hired on subject area as opposed to program planning and implementation skills. With this barrier identified, many of the respondents suggested that education should be developed for Extension agents and specialists alike. Participants felt that it would be necessary to learn to craft messages based on specific audience needs in order to use a social marketing approach. Several participants indicated that either they or the Extension agents they work with would be uncomfortable trying to tailor messages. Julia explained, "support and help with terminology and wording for program descriptions is one of the biggest needs we have".

A second major barrier to adopting social marketing is the amount of resources it takes to properly understand a target audience and their specific behavior and barriers. These resources include planning, time and money. Patrick suggested that "a barrier to the use of social marketing ... is that we look for instant success in Extension". Julian asserted that "the incredible demands on [agents'] time prevent them from trying something new". The state of Extension means everyone is regularly doing more with less time and less money. Additionally, obtaining the level of participation needed from audience members and support of administration may serve as a

barrier to conducting research-based programming through a social marketing approach. “To use social marketing more in Extension – it would be hard to get everyone to a meeting” (Julia) and it would be “extremely difficult getting everyone to the table” (Julian).

The final major barrier to adopting social marketing is resistance to doing things differently, and the “status quo” of doing things the way they have always been done. Helene stated that “[In Extension] we typically do things the way they’ve always been done ... that’s what works” and Patrick identified a “resistance to doing things differently”. There is also resistance to tailoring a message to a subset of an audience. Extension is generally of the mindset of trying to reach everyone and get them to do everything as opposed to reaching a subset of the population with a targeted message.

Although a number of barriers to Extension’s potential adoption of social marketing exist, this approach would be beneficial to Extension in general. “We need social marketing to stay relevant in Extension” (Julian) and with “the proper guidance and education, social marketing can be a powerful tool”. Social marketing applied to existing areas of focus would support the creation of more impactful programs. There is a great value in an approach that supports the creation of behavior change.

Motivations for using social marketing. While a lack of knowledge about the social marketing approach is a primary barrier, education and training on this strategy was identified as a major motivator to its potential use. Training needs exist at various levels ranging from raising basic awareness to more in-depth training on application methods, techniques, and tools. Subject Julian asserted that for agents to “use social marketing, they would need to know what it is” and Patrick felt that “incorporating social marketing into Extension can be done if we educate”. Julia felt strongly that “agents are already good at getting to needs” and that they need help with “messaging and finding appropriate terminology for their audience”. Patrick suggested that “we need to engage more in evaluation training” and “provide tools and show how to use them”.

The discussions about encouraging the use of social marketing centered on providing quality education and supporting tools; only one of the respondents spoke about providing incentives as a motivator.

Describe University of Florida Extension key leaders’ opinions towards the current methods for evaluating behavior change. (Objective 2).

Program evaluation in Florida Extension. There was consensus among the respondents that evaluation is extremely important to Florida Extension. Subject Julia laughed when the conversation turned to evaluation and said, “it’s really important – some days it’s all I do!” and shared a number of evaluation activities that were currently in progress. Helene asserted “program evaluation is *the* most important part of Extension”.

Extension recognizes that evaluation is highly important to funding levels. Patrick recognized that “good evaluation can increase funding in Extension” and others suggested that quality evaluation was important to maintaining current levels of funding. Patrick suggested that financially “downsized states are more prone to vigorous evaluation”. Evaluation is accepted as an important tool for accountability at the individual, county, and state level. According to Subject Julian, “program evaluation is an important tool to tell us what we’re doing right or wrong”. Florida does very well in evaluation overall. While evaluation is recognized as a critical piece of Extension programming, and that Florida does very well in this area, there is room for improvement.

Evaluation could be improved and several enhancements related to evaluation were suggested. Helene felt that “program evaluation is the most neglected part of extension” and that “we don’t make enough time for program evaluation”. Julian wants “to see evaluation shift to be more client-focused”. It would be good to see the research better connected in situation

statements (Patrick). Many Extension agents remain intimidated by evaluation. Ian felt that “we don’t always evaluate what is most valuable or make the time to do things right”.

The most common type of evaluation being used by Florida Extension agents is the measurement of short-term knowledge gain. “Pretest-posttest and intent to change are the norms for Florida Extension evaluation” (Patrick), and “pre-post test and verbal evaluations are the most common types used” (Helene). Julia uses “some pre-post test, mainly posttest, some qualitative and knowledge-based questions” with “minimal use of longer-term follow-up”. “Paper-based evaluations and informal shows of hands are the most common evaluation methods [for my programs] ... but some [agents] are more formal or creative” (Julian). Julian felt very strongly that “personal feedback is a really valuable and important source of data, but can be hard to quantify”. Relatively few agents are following up at three, six, and twelve months, or beyond, to determine if behavioral change has taken place, and this is dependent on the specific Extension program.

Ian acknowledged value in behavior change while asserting, “it is not always easy to measure behavior change” and “a lack of behavior change does not equate to failure in Extension”. Ian also felt that “we need to make sure that we don’t lose sight of other impacts while recognizing the importance of behavioral change”.

There is a desire to see more long-term follow-up evaluation used. Additionally, there is room for improvement in tying findings back to program planning and situation statements. Extension professionals have a desire to improve their ability to make decisions using evaluation data.

Barriers and Benefits to Improving Program Evaluation. Educational needs are a primary barrier to improving program evaluation. Helene said, “training would motivate extension agents to improve their evaluation” and “workshops that supported agents in developing evaluation tools would be helpful”. The respondents thought that training on evaluation would be most beneficial if they were relevant to agents’ areas of expertise as opposed to covering general evaluation techniques. Basic program planning training is wanted. Helene said, “many faculty ... are confused as to what constitutes a program”. Agents should have opportunities to be guided through the stages of evaluation instrument development. The preferred time to start training agents in evaluation is when they are developing new programs.

Identifying appropriate evaluation measures and collecting the right types of data are challenges. Julian offered, “we do not always evaluate the ideal things”, and Helene echoed that “we are not necessarily capturing the right data”. Support in selecting the appropriate data to collect, choosing methodologies for data collection, and drawing conclusions from evaluation data is needed.

Evaluation training to help agents better connect the research base with outcomes is needed. A key motivator for attending trainings and improving evaluation activities would be if these educational opportunities provided them with or helped them to form objectives and language that could be used in their annual reporting. Patrick suggested that “in addition to improved reporting, ... agents would be motivated to change evaluation practices if the new practices supported their speaking to their county decision-makers”.

There is considerable amount of interest in standardizing evaluation within same programs across the state. Helene told me that, “in addition to training, the provision of evaluation templates, online, would be helpful”. Several participants identified a fragmentation in evaluation methods throughout the state, even by agents who teach the same program. Interestingly, every respondent suggested that standardized evaluation tools should be developed. Standardized tools would be helpful at all levels, from the individual agent, to the county, state, and region. Subject Julian said, “[I] would like to see tools to take off the shelf made available” and Julia “would like to see pre-configured questions provided”. “Florida Extension is clamoring for evaluation tools” (Patrick). “An easier, streamlined evaluation system that provides a better product would motivate people to adopt new evaluation methods” (Julian). State specialists in

specific subject areas, evaluation experts, and Extension agents should be involved in the development of uniform tools. Standardized evaluation tools should be used to compile data on a statewide level while allowing agents the opportunity and flexibility to “pool their own data” (Patrick).

Time is a barrier to improving and changing evaluation activities. Julia struggled to balance the idea that “evaluation is *really* important” while “[evaluation activities] take away from primary responsibilities”. Not all Extension professionals recognize that evaluation is a part of the job.

Status quo is an additional barrier to changing how evaluation is conducted. Helene told me that in order to make changes, “we need to take away the importance of knowledge gain”. A “lack of encouragement to make changes ... at the supervisory level ... prevents agents from improving on their evaluation” (Ian). Monetary incentives or certain forms of recognition would serve as motivators for improved evaluation. “Merit-based raises and recognition ... such as awards ... would motivate agents to make changes to their current evaluation methods” (Julian).

Capture and document University of Florida Extension key leaders’ suggestions for improving these areas through resource development and training. (Objective 3).

General training preference is an area in which there is a great deal of diversity. Some very strongly prefer short webinars while others prefer hands-on and in-person training for their own individual learning. “There is simply no one-size fits all when it comes to professional development” (Ian). Variety in delivery methods is vital. “More hands-on training, not just lecture, would be appropriate to improve skills on evaluation and social marketing” (Julia). Individual mentoring, self-study, micro-webinars, and standard in-service trainings are accepted as possible methods for encouraging the use of social marketing and improving evaluation activities. Patrick felt strongly that “a continuous patter of messages for each training area would be helpful”.

There is great merit in using online, technology-based programming to support professional development activities. Julia cautioned that “online training is great but it is hard to focus with all of the other demands we have in our offices”. Helene liked the online format but felt strongly that trainings should be recorded so that they could be reviewed by individuals who were pulled away or wanted to review materials at a later date. Julian cautioned that “technology is an issue when it comes to distance training” with a laugh. Helene suggested that webinars may be appropriate for raising awareness about a topic, while workshops could be more appropriate for encouraging implementation of practices.

Participants stressed that basic training is needed in the full programming process, from needs assessments, through implementation, and evaluation. Respondents thought that training could support programming that better support Extension clients. Julian thought that “to improve our [programming], it is critical to find out what is important to clients” and Helene suggested that “we need to work as an organization to serve clients”.

There was a call for training on various educational methods. Patrick said “Extension is in need of a different mindset ... we need to deliver in different ways” and Julian said “there is a better way than the old-fashioned meeting”.

Conclusions

This study explored key leaders’ perceptions about creating and measuring behavior change in the Florida Extension system. As a needs assessment, this information will provide guidance for the creation of resources and future professional development activities. Every participant confused social marketing with social media, even though each did in fact know what social marketing was to some extent. The researcher shared the term *Extension Behavior Change*

with participants. This term has been used in recent Extension professional development activities, and the interview participants were generally in favor of the term. Participants were overall strongly in favor of social marketing as a promising approach to Extension programming. There was general consensus that a social marketing approach would not be particularly very different from the current approach to Extension programming, but that social marketing incorporates a deeper level of research and planning. Several participants pointed out the elements they identified as being particularly similar, and all identified similarities among existing needs assessments and evaluation activities.

The social marketing process (McKenzie-Mohr, 2011) is compatible with the Conceptual Programming model (Boone et al., 2002) and the two were overlaid to demonstrate this (Figure 1). The social marketing steps of audience identification, behavioral goal specification, and audience analysis were found to fit within the planning stage of the Conceptual Programming model. Development and pilot testing of strategies fit well within the design and implementation phase, and broad-scale implementation and evaluation fit between design and implementation and evaluation and accountability. The synchronicity between social marketing and Extension programming with interview participants led to an overlaying of the two models (Figure 1), and the resulting graphic could serve as a guide for applying social marketing to Extension program planning.

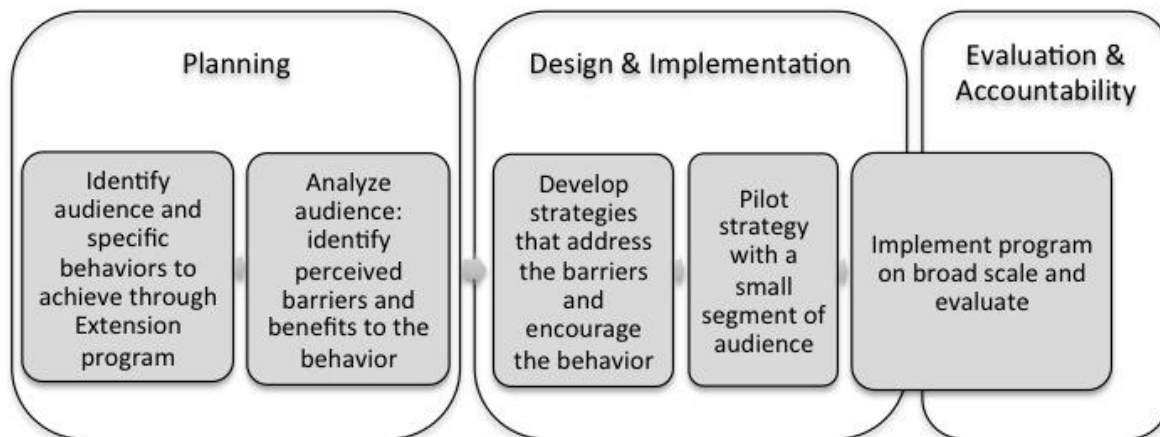


Figure 1. An example of the compatibility of the social marketing process and conceptual programming model as applied to Extension programming. Adapted from Boone et al., 2002, and McKenzie-Mohr, 2011.

When approaching behavior change using social marketing, the goal is to reduce identified barriers and increase the benefits (Kotler & Lee, 2008; McKenzie-Mohr, 2011). A gap in knowledge was identified as the primary barrier to the use of social marketing within Extension programs, and training was identified as a primary motivator to use this approach. Limitations of resources such as time, money, and planning barriers are not new to Extension (Hill & Parker, 2005) and were identified as barriers to the adoption of social marketing and improved evaluation activities.

When the dialogue moved from the creation of behavior change to the measurement of the same, participants were in agreement that evaluation could be improved and suggested several improvements related to evaluation. All participants suggested that standardized tools be developed.

Parallel to the discussions on ways to improve behavior change capabilities in Florida Extension, educational needs were identified as a primary barrier to improving program evaluation. While evaluation professional training is regularly offered, it appears that even more frequent and varied learning opportunities would be well received. Educational programs specific to agents' areas of expertise as opposed to general evaluation techniques were seen as valuable, and should be explored. In contrast, a need for very basic program planning training was also emphasized, and both should be offered. A key motivator for attending trainings and improving evaluation activities was to use these educational opportunities to help agents form objectives for annual program planning and provide them with information and language that could be used in their annual reporting.

Each of the interviewees commented on general training preferences. This is an area in which there was the most diversity of preference. Some respondents very strongly preferred short webinars while others prefer hands-on and in-person training for their own individual learning. All seemed to agree that variety in delivery methods is a key to successfully serving the majority of Extension professionals.

Implications and Recommendations

As social marketing was seen as a promising approach to programming, Extension agents should consider incorporating this methodology into their programs. While Florida Extension overall has not used social marketing to any great extent, the interviews revealed that many Extension professionals are currently using certain elements of social marketing, and that this approach has great potential. It would be advantageous to explore ways to expand those elements into complete social marketing campaigns. To provide an example, the respondents felt strongly that Extension is skilled at researching, identifying, and understanding stakeholders' needs. Because these are essential elements of a social marketing campaign, and this is an area where many feel comfortable, it makes sense to empower Extension agents to build complete social marketing campaigns from this area, focusing on the social marketing elements with which they are less comfortable. The association of the Florida Extension Roadmap (UF/IFAS Extension Administration, 2013) as an information source that would be beneficial to a social marketing campaign is indicative of the possibility of integrating social marketing into existing programming approaches.

Based on the confusion that the terminology created in the interviews, it would be advantageous to examine the choice of wording when referring to social marketing. The term *Extension Behavior Change* has been offered as a possible choice of term for discussing social marketing in an Extension setting, and anecdotally, the term has been well received. The term references the intent to change behavior through Extension programming, and social marketing is a key method of doing so. However, this term could be improved. This researcher encourages discussion about the terminology used with regard to social marketing in the context of Extension. With the extent of *social media* at the forefront of our thinking in personal and professional lives, it is likely that this confusion will prevail in many settings, and possibly impede our ability to encourage this approach to behavior change. Others should carefully consider the choice of terminology, and recognize the possibility for misunderstandings when discussing social marketing within Extension.

Based on the issues with terminology and the synchronicity identified between social marketing and Extension programming, it is suggested that one of the issues is that Extension professionals need to better understand social marketing not only as a discipline but also as an expression of speech. It would be beneficial for Extension professionals to not only have the ability to use its elements in program planning and reporting but also articulate what social marketing is and what major principles it involves.

Interestingly, a literature search reveals little current work on professional development to increase the capacity of Extension and outreach professionals in applying social marketing to their programs. Interview participants pointed to the need for professional development activities that increase Extension and outreach professionals' competencies in behavior change. A logical next step would be the identification of specific competencies that are needed by Extension professionals to apply social marketing to their programming efforts. Competencies are the knowledge, characteristics, and skills that may lead to outstanding performance and can be valuable in driving improved performance and organizational change (Stone & Bieber, 1997). Once the needed competencies are documented, a needs assessment approach could be used to determine which competencies should be prioritized through professional development activities.

Subsequently, social marketing professional development programs should be developed to address the identified priority competencies and reduce the knowledge barrier. There are a wide variety of preferred training options that could support Extension's creation of behavior change and measurement of impacts, and the delivery of training using numerous methods should be considered. According to the key leader participants, online training, webinars, and mixed-methods training would be appropriate for training related to social marketing and program evaluation. Advanced professional development activities could provide guidance through the planning stages of social marketing applications within specific contextual issues addressed by participants.

Further research may reveal ways to reduce the barrier of limited resources, although many may consider this a perennial issue. One recommendation for reducing the resources needed to apply social marketing is for tools to be developed to make the process less time consuming for Extension professionals. While the very nature of social marketing dictates that each campaign would be unique to each individual program and audience, tools that provide structure to the planning process, with the unique needs of Extension programming and evaluation in mind could be helpful and would be well received. This researcher offers that the very elements that make social marketing so relevant to Extension are the elements that can help to encourage its diffusion among Extension professionals. The use of social marketing tools, such as commitment and social norms, paired with actions to reduce the barriers and enhance the benefits of adopting this new behavior, may be the key to facilitating its adoption.

It was interesting that every single respondent recommended that standardized evaluation tools should be developed. This should be explored. Responses indicate that off-the-shelf evaluation tools would be well received. The state would benefit in that there would be additional standardized evaluation measures available to report. Individuals would benefit from reduced time and effort in evaluation activities. The organization is currently progressing in this direction, and the findings of this study validate these current activities.

To meet the demand for additional program evaluation instruction, training that guides agents through the stages of program planning and evaluation instrument development should be offered and expanded. Educational programs should include methods of identification and collection of the most appropriate types of data, and should be structured in ways that guide agents through their reporting processes. It may be beneficial to find ways to provide this training so it is available when agents are in the early stages of developing new programs. Hands-on programs, individual mentoring, self-study, micro-webinars, and standard in-service trainings were all requested as possible methods for encouraging the use of social marketing and improving evaluation activities. Online, technology-based programming should also be offered to meet the needs of diverse individuals.

As the National Research Agenda recommends a focus on identifying the factors and characteristics that enable individual and group adoption processes to encourage positive community change, it is recommended that research be conducted to explore social marketing as a means to encourage behavior adoption among Extension clientele. Social marketing offers a number of tools that can be used to encourage change. These include: incentives, the reduction of

barriers and enhancement of benefits, the use of social norms, audience commitment, prompts and reminders, and targeted messages (Kotler & Lee, 2008; McKenzie-Mohr, 2011). It would be advantageous to explore these specific tools as means for encouraging the adoption of social marketing within Extension.

In addition to exploring the competencies needed to apply social marketing to Extension programming, research is needed to explore the efficacy of this approach to behavior change. While they have been well documented in many applications and environments, interventions such as the application of commitment and prompts should be further explored within Extension programs to determine the possible effect on rate of behavior change and document best practices for using this strategy.

As previously noted, there is a shortage of literature documenting use of social marketing to encourage behavior change within the Extension environment. It is hoped that more Extension professionals in and beyond Florida will consider applying social marketing to their programming, and it is also hoped that those who are using this method of encouraging behavior change will publish their experiences to add to the literature and contribute to the conversation about this approach. Social marketing is a promising strategy that can guide programming to encourage behavior change, and its ardent focus on an audience's needs makes it highly relevant to Extension.

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