

An Extensionist's Guide to Farm and Site Visits¹

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Farm and site visits are a major component of Extension work, whether as a county faculty member or state specialist. They serve various purposes, such as informal check-ins, relationship building, problem solving, sharing technology, and information collection. While they may be time-consuming, farm visits are often the most effective method for addressing specific problems and developing deeper connections with stakeholders (Petrzelka, Padgitt, and Windestenn 1999). These visits provide firsthand knowledge of the issues clients face and are effective in establishing collaborations, assessing needs, understanding agricultural production systems, and validating research applications (Oakley and Garforth 1985; Seevers and Graham 2012). This publication explores different facets of farm and site visits, including preparation before the visit, the investigative (problem-solving) process during the visit, and post-visit procedures. Additional resources are included to support client visits and troubleshooting.

Types of Farm and Site Visits

According to Murry (1968), there are five types of visits:

- **Public relation visits:** For Extension workers to meet new clients and to get acquainted with their operation and Extension needs.

- **Service visits:** Used to address specific problems or needs, such as addressing questions related to pests, diseases, or soil sampling.
- **Teaching visits:** As part of educational programs, promoting new techniques, or analyzing production systems.
- **Organizational visits:** Used to help plan for field days, meetings, and committees.
- **Informal visits:** Used to help build and maintain relationships, gather information, and evaluate an Extension program's progress.

Site Visit Planning

Effective planning involves identifying needs and objectives, optimizing time, and being prepared for various scenarios. Service visits are probably the most common and are initiated by the client with a direct request related to a specific issue. Prepare for the visit by gathering detailed information about the site and concern. This includes, for example, relevant crop information, planting date, client observations, management practices and history, and weather history. If needed, consult with colleagues regarding the issue before the visit. For landscape- or field-scale issues, tools like the USDA Web Soil Survey (<https://web-soilsurvey.nrcs.usda.gov/app/>) for soil type identification

1. This document is SS-AGR-485, one of a series of the Department of Agronomy, UF/IFAS Extension. Original publication date September 2024. Visit the EDIS website at <https://edis.ifas.ufl.edu> for the currently supported version of this publication. © 2024 UF/IFAS. This publication is licensed under CC BY-NC-ND 4.0.

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and historical images on Google Earth (<https://earth.google.com/web/>) can help to assess historic land use (trend over time). Additionally, consider selecting and printing key technical fact sheets or consulting Ask IFAS publications (<https://edis.ifas.ufl.edu/>), which can serve as valuable resources for clients.

For site visits, you can utilize online tools such as Google Forms, Microsoft Forms, or Qualtrics to help archive and organize your data collection. Below is a suggested list of information to gather that may help with your site investigation:

1. **Name:** The name of the stakeholder or farm owner.
2. **Address/location:** The general location is often found through a mapping app but you may also require further detailed directions to the specific site from the client. Consider requesting a “dropped pin,” especially for hard-to-find fields in rural areas. When visiting multiple sites, strategically plan your travel to minimize time spent on the road and to ensure access to supplies, restroom facilities, or other needs.
3. **Biotic or abiotic:** Determine whether the issue is caused by living (biotic) organisms like pests and diseases, or nonliving (abiotic) factors like weather or soil conditions, or whether the issue is related to management. Biotic issues normally have random patterns. Abiotic issues will have patterns in the landscape or will affect the whole area.
4. **Crop/livestock:** The type of crop(s) grown at the location, and/or livestock raised. Request information about variety or breed, as well as primary characteristics of the production system. For visits that involve livestock, it is helpful to gather some history regarding animal health or condition and current housing and feeding management practices (e.g., pasture access and/or type of forage the animals are consuming).
5. **Planting date/stage of maturity:** When the crop was planted and its current growth stage. A similar approach is used for perennial crops or for age/category of animals.
6. **Cultural practices:** Cultural methods being used, such as crop rotation, tillage practices, or planting techniques.
7. **Management practices:** Current and recent past management practices, such as crop rotation, grazing management, planting methods, etc.

8. **Management goals:** The long-term goals and objectives for the client, the farm, and/or crop.

9. **Pest management:** Details of any pest control measures being employed.

10. **Fertilization:** Information about fertilizer use, including types and application rates. Note that some will describe fertilization in units of actual nutrients, whereas others will report in pounds of total fertilizer mix applied. Make sure you understand the difference.

11. **Other management applied and previous history of the area:** Any additional management practices not covered in the previous points, including background information about the farm site, previous crops, previous management practices including chemical applications, and past issues or notable events might be valuable.

12. **Weather history:** Recent weather conditions and any significant weather events that may have impacted the crop.

Each commodity or natural resource may require additional or a different set of questions to help you prepare for the visit. With experience, and consultation with county and state colleagues, the question/information request list will improve and become more suited to the production or natural resource systems in your region.

Conducting the Visit

Before heading to the site, send a reminder and confirm the appointment. Remember to ask the client if it is still convenient to make the visit. Remember that agricultural activities are dynamic and weather dependent. Note that some calls are urgent and need to be addressed promptly. Depending on the relationship with the client and the urgency of the matter, it may require a visit outside of regular office hours. Be mindful of biosecurity when visiting multiple farms as pathogens and weeds can be inadvertently transported between sites on clothes, tools, and vehicles. An extra set of clothes, a sanitizing kit, and avoiding using your vehicle when driving over production fields can prevent those issues.

Develop respectful professional relationships and be considerate of the stakeholder’s perspective and management style before offering recommendations. Extension professionals are often called for assistance on a specific issue, but the issue may not be easily isolated from the production

system (i.e., recommendations to address the issue could negatively impact the larger production system). In those cases, considering the entire system may be necessary to provide proper recommendations and a course of action. These more complex issues often require assistance from additional experts (including state specialists) for guidance. Remember that, in many cases, the agronomic aspect is just one part of the puzzle, while the human component (e.g., willingness to change, capacity to implement, and personal expectations) is a key factor for recommendation adoption.

Asking questions and observing are often more beneficial to developing client trust and cooperation than providing immediate answers, so be inquisitive and observant. Rephrasing questions to validate responses can help uncover details. Observe the surroundings for cues, pay attention to infrastructure and implements, containers and labels of products that might have been used, and “read” the land and landscape. Document the visit with pictures and notes but ask the client for permission first. Refrain from using any of the pictures or information in public documents without consent. When collecting samples, follow specific guidelines provided by the lab, and be clear about sample shipping, analytic costs, and expected reporting time from the lab. Communicate openly with stakeholders and be clear about the steps involved, especially when requesting help from other parties, even if within our institution (e.g., some diseases are of mandatory notification and can impact operation). Below is a partial list of analytic resources available to the Extensionist and/or client.

- **Soil sampling procedures:** Guidelines for collecting soil samples, ensuring accurate and representative samples for nutrient analysis.
- **Soil and plant tissue testing:** Procedures for collecting soil and plant tissue samples for nutrient testing, which can help in diagnosing nutrient deficiencies or toxicities.
- **Sample submission guide for plant diagnostic clinics:** Instructions on how to properly collect and submit samples for plant disease diagnosis.
- **The Florida Plant Diagnostic Network:** Information and resources provided by a network dedicated to plant disease diagnosis and plant health management.
- **Nematode Assay Lab procedures:** Step-by-step instructions for collecting samples for nematode analysis.
- **Florida Plant Identification Help:** A service provided by the UF Herbarium to help identify plant species. Particularly useful for uncommon weeds and native plant species.
- **Distance Diagnostic and Identification System (DDIS):** A digital platform enabling UF/IFAS Extension agents to submit digital samples for quick diagnosis of various agricultural problems.

When managing sample collections and shipping, maintain clear communication and transparency, especially regarding the cost and handling of samples. Key points to consider are:

- **Cost of analysis:** Clarify who will cover the expenses for sample analysis. This might be the stakeholder, your program, related grant funds, or other resources.
- **Sample destination:** Inform stakeholders where the samples are being sent, particularly in cases involving pathogens. This information is important for transparency and for the client’s understanding of the process and timeframes involved with analysis and reporting. If the issue requires immediate action, then choose labs that can provide fast services.
- **Mandatory reporting of diseases:** Be aware of notifiable diseases for both plants and animals. These are diseases that, by law, must be reported to government authorities. Familiarize yourself with the list of notifiable diseases and the procedures for reporting them. You can find more information through these links:
 - [Notifiable Diseases and Conditions for Animals](#)
 - [Plant Pest and Disease Programs](#)
- **Open communication:** When involving third parties in the diagnostic process, such as external labs or even other UF faculty, communicate this clearly with the stakeholder beforehand. This includes discussing why their involvement is necessary and how they might contribute to solving the issue.
- **Protocols and notifications:** Remind any cooperating researchers or specialists about the specific protocols and notification procedures related to the samples and their analysis. This ensures that all parties are aware of and adhere to necessary regulations and guidelines.

Notes on Small Farms

Florida has a large influx of people — it is estimated that over 1,000 people move to the state every day to live in urban, suburban, and rural settings. They come with different experiences, goals, and expectations. Major client groups consist of new homeowners and landowners. Often, landowners are first-time farmers who have plenty of ideas but little experience and background in agriculture. However, they are frequently an attentive audience, and easy to work with because they follow UF/IFAS guidelines

and are open to Extension sources' ideas. However, they might require extra work deconstructing previous misconceptions. Start with the basics and build from there and be prepared for frequent follow-ups. Although not traditional clientele, they are becoming a larger and more present audience in our Extension programs.

After the Visit

After conducting the site visit, consider writing a visit report for your record keeping. This can help with later case review, and it will become a good reference when future similar issues arise. It will also help with UF/IFAS annual reporting. Following up with the client helps to ensure the effectiveness of the visit and maintenance of a positive and successful relationship.

Points to Consider

- **Reviewing implementation and outcomes:** Follow up to see if the practices recommended during the visit have been implemented and use the information to help monitor and document the outcomes. This helps calculate the effectiveness of your recommendations and provides valuable feedback for future interactions. It is also the best way to document long-term outcomes and impacts for your annual report.
 - **Interpreting laboratory results:** If samples were sent to a diagnostic laboratory, ensure that the stakeholder has received and is able to interpret the report. With the report in hand, you can revisit the appropriate next steps with the client.
 - **Record keeping:** Keep detailed records of findings, recommendations, and outcomes. This is important for program evaluation and reporting, and as a learning tool. Understanding what worked and what did not in different scenarios enhances your ability to handle similar situations in the future.
 - **Further assistance and visits:** Based on the results and the stakeholder's needs, additional farm visits might be necessary. If the problem remains unresolved, consider involving an Extension specialist, more experienced Extension agents, or professionals who can offer more specialized knowledge and guidance.
 - **Providing detailed information:** When involving Extension specialists, provide comprehensive information, including answers to basic questions stated above, field observations, and lab reports. This helps the specialist quickly come up to speed and contribute more effectively to solving the issue.
- **Adapting recommendations:** Recognize that the same recommendation may not work for every client or location due to differences in management styles, expectations, and production conditions. Tailor your advice to each specific situation.
 - **Collaborating with agencies and other groups or professionals:** Be aware that farmers might be involved with other agencies and groups or professionals. Engage respectfully with these entities. Some solution options might be eligible for cost-sharing dollars from local, regional, state, or national agencies. Refer to those when possible and establish a good working relationship with their agents.
 - **Utilizing success stories:** Share success stories to showcase the impact of your program and to extend its reach in the region. Encourage farmer-to-farmer connections and discuss with stakeholders the possibility of hosting events, demonstrations, or research projects that could benefit others in the area.

Legal Matters

Sometimes we might run into contentious situations, either because of recommendations (direct or general UF/IFAS recommendations), reportability of pests or diseases, or litigation between stakeholders. Before taking any action or providing technical feedback, contact your Extension directors (county and district) for guidance. If the issue escalates, contact your Program Leader. You might be summoned to testify, receive a subpoena for a court appearance or release of documents and communications, or serve as an expert witness. UF has a legal team that can assist with those issues through the [UF General Counsel](#). Avoid discussing legal matters or potentially contentious issues with the media. If approached by the media or if there is a need to issue a public statement, consult with the [UF/IFAS Communications](#) team for guidance on how to proceed. They can help craft appropriate language and handle media relations.

Understanding Roles

Local Extension agents are the primary UF/IFAS connection with stakeholders, while specialists assist mostly with problem solving and provide agent training. Cooperation and communication between agents and specialists are important to the success of the mission of UF/IFAS Extension. When specialists are contacted directly by stakeholders, it is important to include county Extension agents in the conversation and communicate/coordinate about the interaction and client visits. The local agents are the first point of contact and can provide immediate and on-site help. Specialists will provide support for agents on problem

solving and on handling recommendations and conflicts. Specialists and agents are equipped with technical and practical knowledge. While the specialist can contribute more specialized information and be able to sort through various recommendations from the theoretical perspective, the agents contribute the local perceptions and nuances, along with a strong applied background. The interaction provides information exchange that benefits both the county agent and the state specialist.

Etiquette and Best Practices

Etiquette plays a significant role in maintaining productive and respectful relationships within the Extension community.

FOR AGENTS

When facing a problem that requires specialist support, prior to contacting the specialist it is essential to gather as much information as possible about the problem, situation, location, farmer, etc. Review fact sheets to get familiar with the crop and issue. This will facilitate communication. Having adequate information available will allow specialists to narrow down the problem, be prepared (equipment, materials, etc.), and potentially guide the agent through and solve the issue without a visit. When requesting a specialist's help, follow up once the solution is implemented and provide feedback. **Regarding relationships between agents:** County borders are to be respected. If stakeholders from neighboring counties reach out, contact that county's agent regarding the connection and/or inquire about a joint visit. Regional working groups are another resource to be explored. Rely on more experienced colleagues for mentorship on a topic and discussion of recommendations. It is likely that they have already had that question before and will assist you.

FOR SPECIALISTS

It is important to always refer to the local agent when contacted directly by a client. More than a courtesy, this is a way to build relationships, learn from local experience, and provide training. Furthermore, it connects the stakeholders with their local support. Agents frequently complain that specialists are not available or take too long to respond, and that specialists go on farm visits without notifying or including the local agent. Be aware that in commercial agriculture, some matters are urgent and need immediate action. When writing on-farm research proposals or developing projects, involve agents on the conceptualization, planning, and execution, and do not wait until the last minute to request letters of support. When possible, include agents on grant proposals and assign them funds for farm

visits and field days. Consider including your students on farm visits. It is a great opportunity for them to learn and connect with production agriculture.

Final Remarks on Farm and Site Visits

Farm and site visits are great opportunities for learning and engaging with clients. However, be mindful of the time and effort these visits require. Plan them purposefully, keeping in mind the educational aspect of Extension work. A major role of an Extensionist is to educate stakeholders to make informed decisions, not just provide solutions to clients with Extension issues. Confidence can help build client respect, but avoid overconfidence (and pretentiousness) and the excessive use of technical jargon, which can be off-putting and potentially detrimental to your reputation. Communication should be clear and understandable to your audience. Showing respect and positive intent goes a long way towards earning trust and respect in return. Never be ashamed of saying you do not know, but always follow up on questions that remain unanswered. It is better to commit to finding out more information and providing the right support to a client than it is to give incorrect or uncertain answers that could undermine your credibility. UF/IFAS has an extensive variety of information and resources to help you with your visits and the investigative, problem-solving process. With time and experience, conducting farm calls and site visits will become a more natural and rewarding part of your responsibilities.

General Etiquette for Site Visits

- Send a reminder. Text or call the farmer on the day of the visit.
- Arrive punctually, and if delayed, inform the farmer.
- Start with a friendly greeting and engage in a general conversation related to their operation.
- Ask, "How can I help you today?" and let them explain the background of their issue.
- Listen patiently and listen more than you speak.
- Ask questions and avoid jumping to conclusions.
- Respect the farmer's experience and knowledge and involve them in thinking through possible solutions. There is always a reason for doing what they are doing.
- With the farmer's permission, take photos for documentation.
- Seek assistance from colleagues after the visit, tapping into the collective knowledge of the UF/IFAS network.

- Never discredit yourself. Instead of expressing helplessness, commit to finding supporting resources to help with answers and solutions.
- Show genuine care for the farmer and their operation.
- Be reasonably flexible with your schedule, recognizing that farming does not adhere to standard office hours and that farmers have diverse commitments and potential scheduling conflicts.

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