

Building Farmers in the West

Local Coordinator Notebook

*Building Capacity
Building Community*



Extension



United States
Department of
Agriculture

National Institute
of Food
and Agriculture

This material is based upon work supported by NIFA
under Award Number 2009-49400-05877.

Thank you to the many Advisory Committee Members, Local Program Coordinators and Regional Partners who made this work possible!

Thank You to Our Funders:

Western SARE Mini-Grant.
CSU Extension Innovation Grant.
Boulder County Parks and Open Space.
Boulder County Farmers Markets.
Western Center for Risk Management Education.
USDA NIFA Beginning Farmer and Rancher Development.

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First Version Released: July 2012

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Introduction to **Building Farmers in the West**

Building Farmers in the West Overview

The Building Farmers in the West program (BFW) builds farm community and farmer capacity through classroom and experiential learning for beginning farmers and ranchers (USDA defines as 0 – 10 years experience). The classroom program is a series of eight (8) evening classes designed to help New Farmers and Ranchers explore farming as a business and provide Intermediate and Experienced Farmers and Ranchers with tools and ideas to refine and enhance their business management, production, and marketing skills. Building Farmers in the West also offers two types of Experiential Learning: Mentorships and Internships. The Mentorship program facilitates one-on-one mentoring between a beginning farmer/rancher and an experienced, local farmer/rancher. Internships provide a beginning farmer/rancher who does not yet have their own farm a paid opportunity to work hands-on with a local experienced farmer/rancher.

Building Farmers in the West History

In 2007, Colorado Building Farmers (CBF) began in Boulder County through a Western SARE Mini-Grant, CSU Extension Innovation Grant and support from Boulder County Parks and Open Space and the Boulder County Farmers Markets. CBF expanded into four regions across Colorado in 2009 with a grant from the Western Center for Risk Management. In 2010, CBF received funds from the USDA Beginning Farmer and Rancher Development Program and became a multi-state program, Building Farmers in the West (BFW), with similar classes being offered in Colorado, New Mexico, Nevada, Washington, Oregon, and Idaho.

Building Farmers in the West Impact

As of May 31, 2012, Building Farmers in the West had reached over 300 producers in six states. Given feedback from community partners who worked with previous program participants in Colorado, we expect at least 10% will have made such significant progress on their business plans that they will be able to acquire additional capital (land, water, financing), establish new markets (farmers markets, CSAs, restaurant accounts, Farm to School), or complete the requirements to participate in government programs (FSA beginning farmer loans, Value-Added grants, NRCS programs, etc.) within 18 months of completing the course.

Building Farmers in the West Learning Goals

We have established the following learning goals for participants of BFW:

For each goal consider the preceding language, "The learner will be able to..."

- Develop business goals and objectives that align with their values and resources, as the basis for constructing a formal business plan;
- Develop a business plan;
- Describe their personal management strengths and weaknesses and build a plan to address their weaknesses and leverage their strengths;
- Project input requirements and costs based on their business and marketing plans, personal and hired labor requirements, and water and land availability for the proposed production system;
- Understand how successful producers assess and manage risk in their own ag businesses through classroom interactions, Mentor relationships, and on-farm Internships;
- Access a network of community resources that links area producers and forms a shared risk mitigation strategy. This resource network may include: lenders, labor sources (including unpaid volunteers, interns, and paid workers), other producers engaged in direct marketing, other producers with similar production management systems.

For a full list of BFW learning goals, see Chapter 3: Key Learning Goals

The Future of Building Farmers in the West

Building Farmers in the West has received additional funding from the USDA Beginning Farmer and Rancher Development program to continue the BFW program and to develop additional “advanced” level programming. Though this content is still in development, we intend to create at least two Advanced Implementation Courses in key topics in business planning and management and an Ag Business Manager Training. Additionally, we will be expanding an existing Land Link program and offering graduates from Building Farmers classes free access to select legal, accounting and other professional consulting.

Introduction:

Student Learning Pathway



Student Learning Pathway Summary

Building Farmers in the West seeks to guide beginning farmers, transitioning farmers, and those seeking to diversify their existing enterprises throughout the agribusiness life cycle, from entry to exit. In order to accommodate such a wide audience, we have developed several self-assessment tools that help new students assess their strengths and weaknesses and chart their educational path (*see Dropbox, Chapter 10*).

Within the BFW program, a new farmer/rancher can plan on the following Learning Pathway:

1) Principles of Business Planning and Management Class

This is the 8-week business planning class described in detail throughout this notebook

2) Experiential Learning

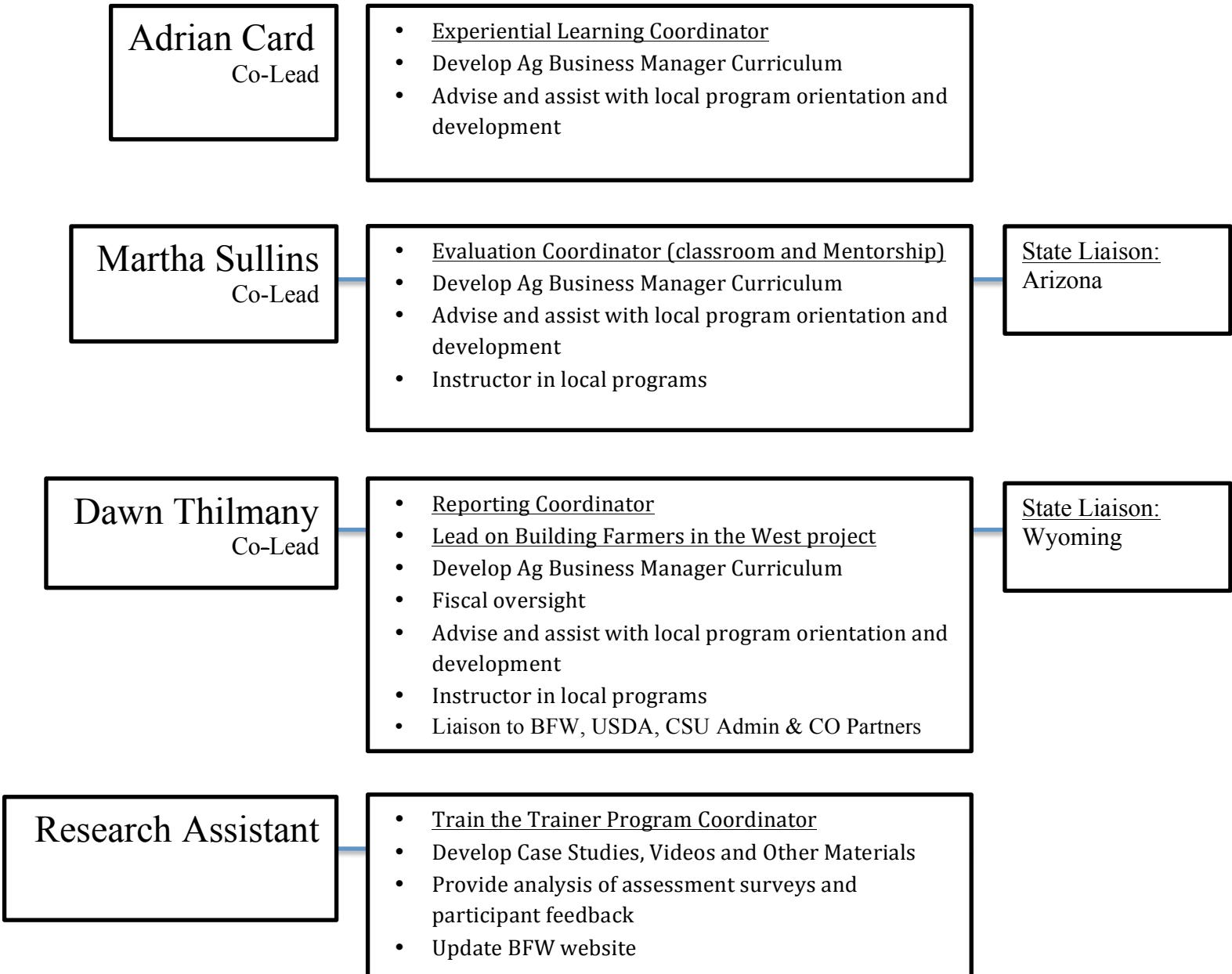
Upon successful completion of the Principles of Business Planning and Management Class, students are eligible to apply for either a Mentorship (if they have a farm/ranch) or an Internship (if they do not have a farm/ranch). Some students will be ready immediately after the Principles class while most will need one or more years of active farm management before they are ready.

3) Advanced Business Management Courses

Upon successful completion of the Principles of Business Planning and Management Class, students are also eligible to enroll in Advanced Implementation Courses. These courses are still in development, but will include key topics in business planning and management (e.g. recordkeeping, taxes, labor, and energy use) and Ag Business Manager Training.

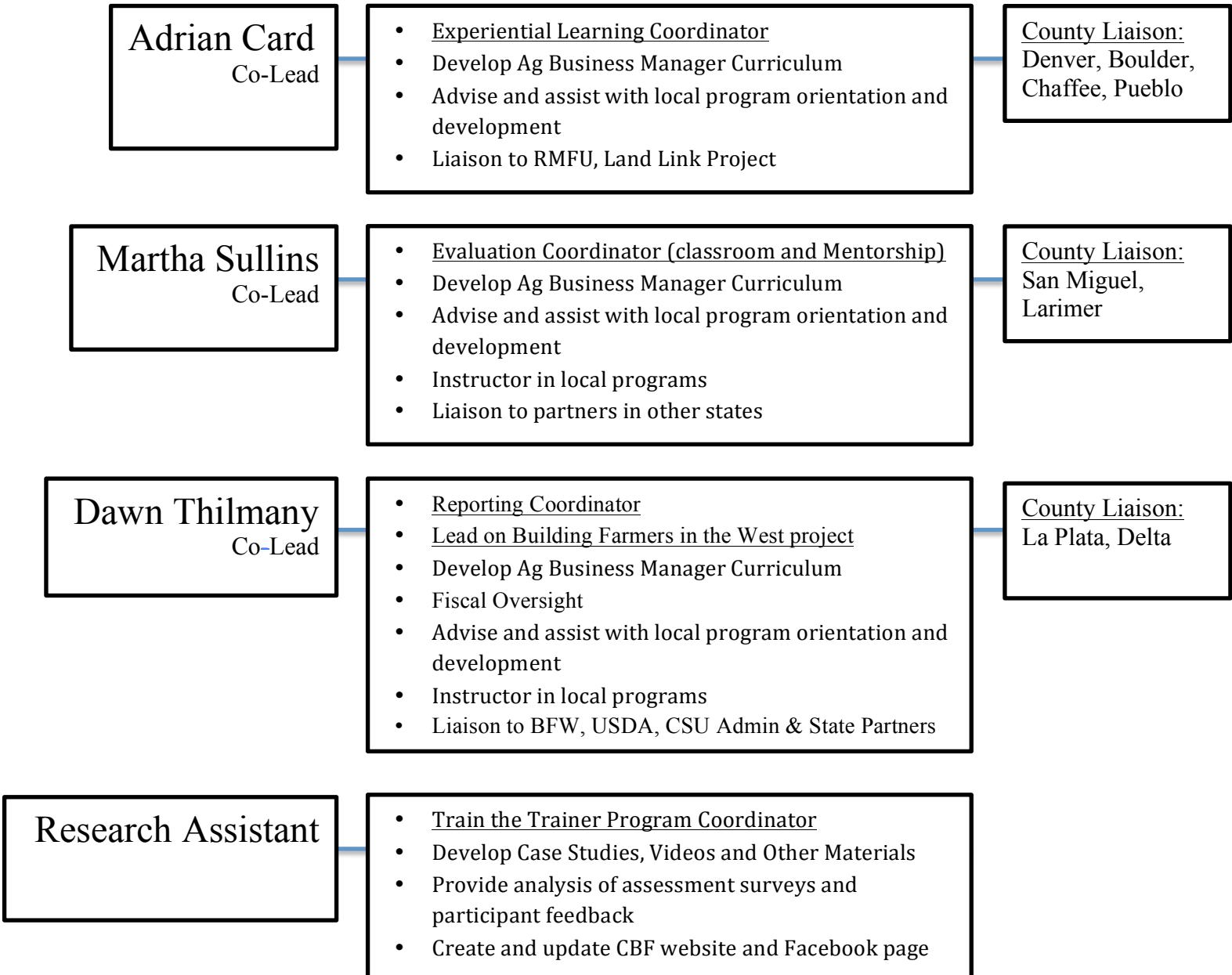
Building Farmers in the West

Leadership Team



Colorado Building Farmers

Leadership Team



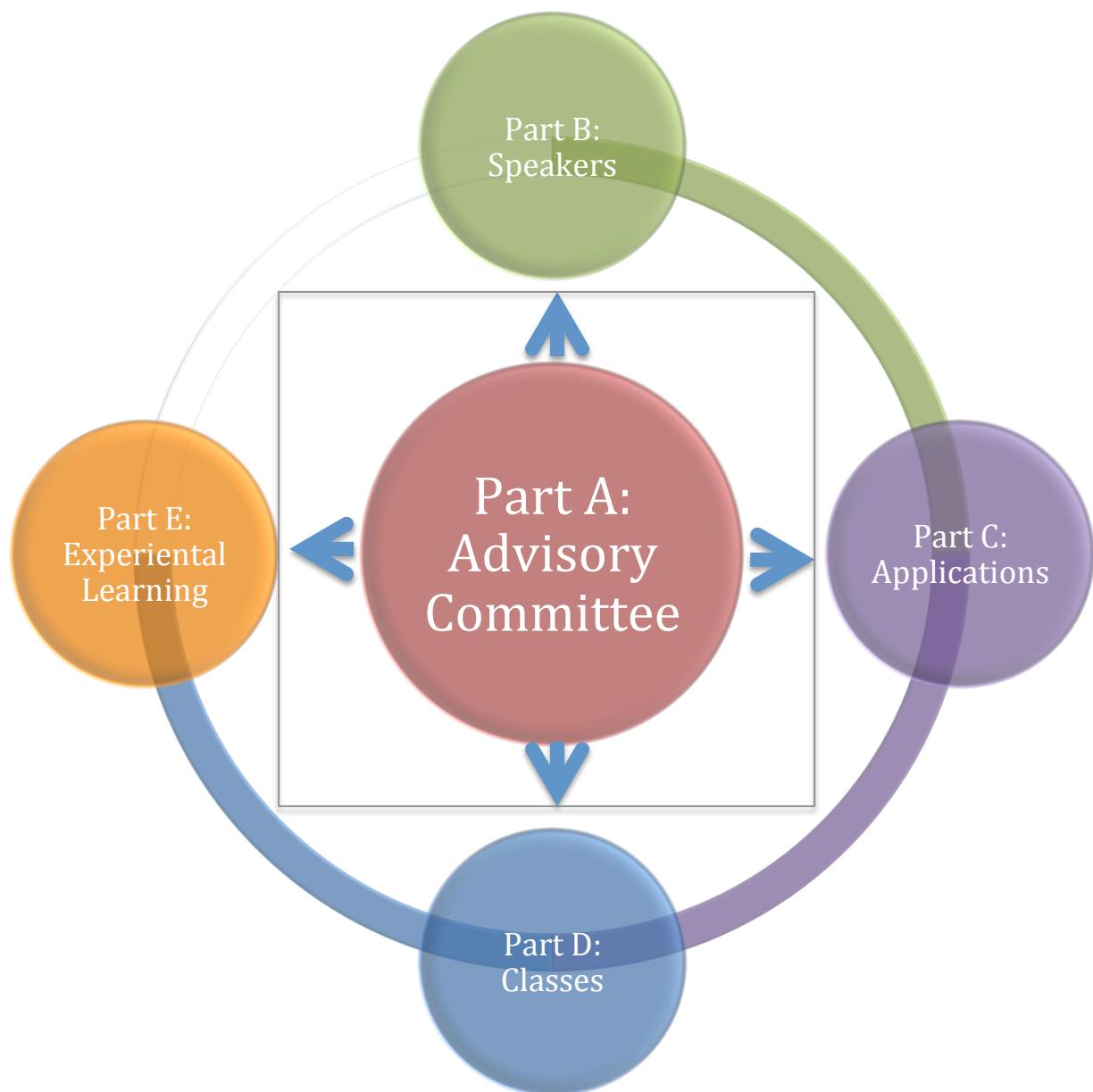


Building Farmers in the West

Part A: Advisory Committee

Chapter 1: Getting Started

Chapter 2: Advisory Committee



Chapter 1: Getting Started

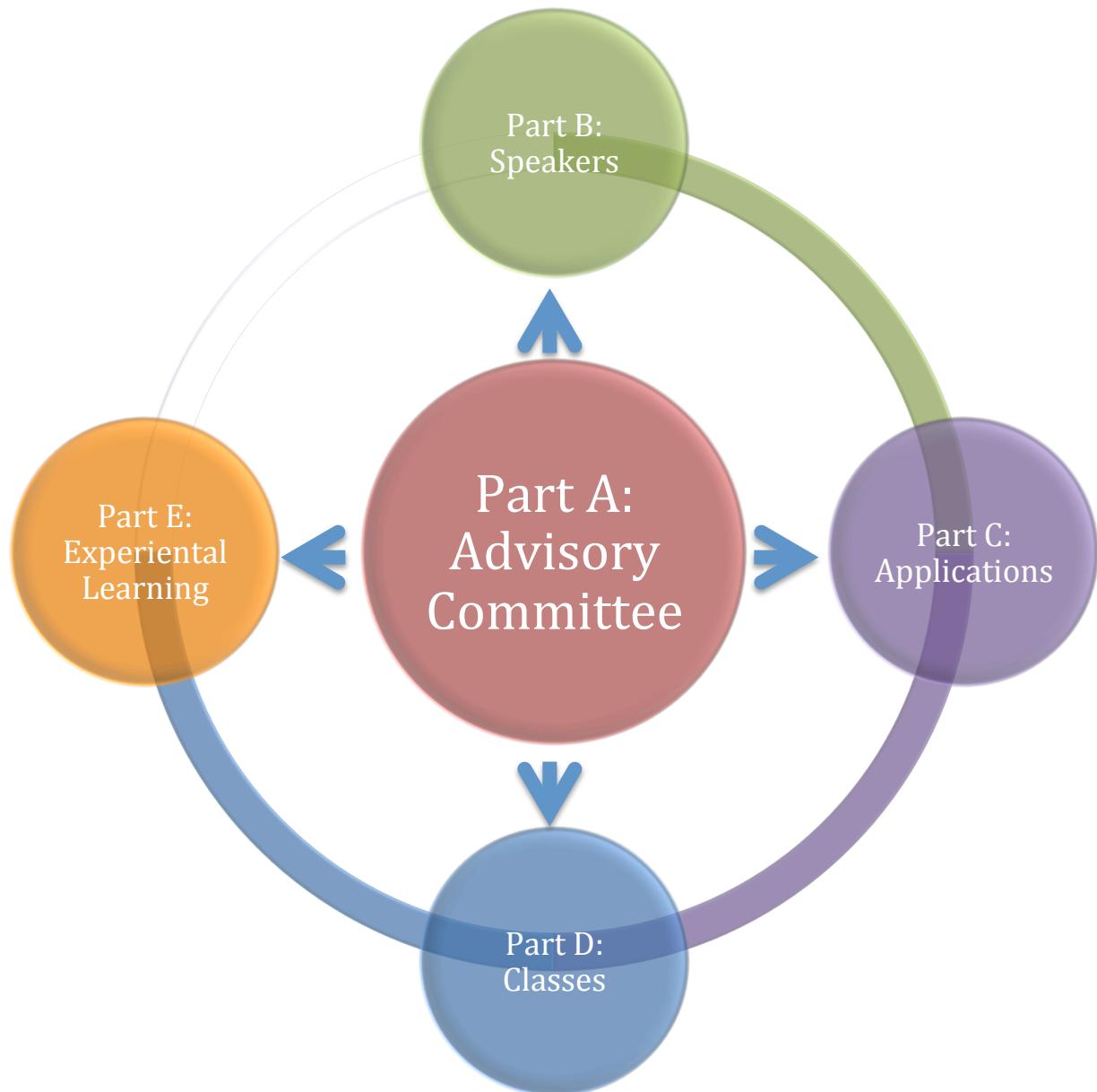
First Steps



Checklist of First Steps:

- Form an Advisory Committee:**
Create a six to eight person Advisory Committee including one to two agriculture professionals, one to two food system experts, and four to six producers (primarily well-connected, direct market producers) that are recognized as leaders in the local agriculture network. Your Advisory Committee can provide ideas on the most relevant speakers, subject matter, and Mentors based on their understanding of community trends and needs. Additionally, they could serve as producer-speakers to deliver subject matter, help market the 8-week program, serve as Mentors for Experiential Learning and make other connections within the local community. Set-up a meeting with the Advisory Committee as soon as possible. (*See Chapter 2 for more information*)
- Reserve Space for 8 weeks of Classes:**
Ideally classes are located indoors with tables and chairs for up to 30 people. You will also need to arrange for a screen, projector, laptop and audio speakers if they are not built into your space. Ensure that space allows for food service and understand any requirements they have in terms of vendors, etc. (*See Chapter 11 for more information*)
- Begin Pricing Different Local Caterers**
Food cost will be a major determinant of program cost so it is important to determine the likely range of prices in your area. Many programs are able to work with the caterer to purchase local food, often from members of the class themselves, as it strongly reflects the values of the students and the BFW program. (*See Chapter 5 for more information*)
- Review BFW Core Curriculum and Brainstorm Relevant Electives**
Building Farmers in the West programs are community-led, so much of the content will be determined by local needs and the local “expert” farmers/ranchers who can teach those specific topics. BFW has defined four core curriculum elements and a number of example “elective modules” to help in program development. (*See Chapter 3 for more information*)

Building Farmers in the West Program Lifecycle





Chapter 1: Getting Started

Program Lifecycle

Program Planning Lifecycle:

The Program Planning Lifecycle Diagram on the previous page outlines the five broad parts of planning and implementing a BFW Program. A brief description of each part is outlined below:

Part A: Advisory Committee

Meet with your Advisory Committee to gauge interest in a local Building Farmers program based on core BFW Learning Goals (*See Chapter 3: Key Learning Goals for more information*). If the Advisory Committee is interested, work together to decide on the most important elective topics you need to address in your area (for example, understanding direct marketing of livestock, or finding land to lease for production). Elective topics can also be “framed” around successful producers, and other regional issues the Advisory Committee feels should be highlighted. (*See Chapter 2 for more information*)

Part B: Speakers

Consider that 8 class periods may not provide enough content time for your area: you may need to extend to 9 or 10 classes or you may need to consolidate your programming into fewer classes of greater time length if your participants are traveling greater distances. (*See Chapters 3 through 5 for more information*) Also, some locations start their programs at different times of the year e.g. January/February versus October to better accommodate local producers. Lastly, remember that some advanced content will be covered in the Advanced Business Management classes.

Part C: Applications

Market the program widely to ensure participation. In particular focus on recruiting experienced producers to add depth to the classroom environment. Extension networks are fine, but you may need to contact farmers’ market managers, community gardens and/or other food and ag businesses/organizations in your region to be thorough. Ask Advisory Committee members for marketing ideas and help with promoting the program. (*See Chapter 6 through 8 for more information*)

Part D: Classes

Make sure your participants fill out their pre-course evaluation online and that they fill out any mid-course evaluations that would be helpful to you in terms of adjusting the pace or content of the course. All participants must fill out a post-course evaluation at the conclusion of the 8-week course. (*See Chapter 8 through 13 for more information*)

Remember that the focus is building business planning and management capability among your course participants. Make sure you refer to this frequently during the 8-week class period and encourage participants to focus on developing realistic planning goals rather than ironing out production details.

Part E: Experiential Learning

Experiential Learning takes the classroom learning out into the field with Internships and Mentorship opportunities for those participants who successfully complete the Principles class and demonstrate an active desire to deepen their understanding of production, marketing, and other business management practices through hands-on experience. Experiential Learning provides the necessary in-context learning to take ideas and concepts and put them into action.

(See Chapter 14 for more information)

Fall Start Planning Timeline

Winter Start Planning Timeline

Program Benchmarks:	September	October	November	December	January	February	March
	Getting Started	Advisory Committee Mtg	Confirm Space, Food, Speakers	Promotion	Application Review & Registration	Pre-evaluation	Start Classes
Part A: Advisory Committee 1. Getting Started 2. Advisory Committee							
Part B: Speakers 3. Developing the Program 4. Speakers 5. Food							
Part C: Applications 6. Promotion 7. Applications & Registration 8. Pre-Evaluation							
Part D: Classes 9. Notebook 10. Weekly Schedule & Homework 11. Classroom Management 12. Business Plan Presentations 13. Post-Evaluation							
Part E: Experiential Learning 14. Mentorship and Internship							

Experiential Learning Planning Timeline

Program Benchmarks:	November	December	January/February	March/April	...	June - August	September	October	...	December
	Recruit Mentors for both Mentorships and Internships	Advertise Mentorship and Internship	Mentorship/Internship Application Review	Mentorship/Internship Kick-Off Dinner	Mentorships Officially Start	Internships Officially Start	Mentor and Mentee Farm Tours	(Optional) Mid-season Evaluation	Internships End	Mentorships End
Part A: Advisory Committee 1. Getting Started 2. Advisory Committee										
Part B: Speakers 3. Developing the Program 4. Speakers 5. Food										
Part C: Applications 6. Promotion 7. Applications & Registration 8. Pre-Evaluation										
Part D: Classes 9. Notebook 10. Weekly Schedule & Homework 11. Classroom Management 12. Business Plan Presentations 13. Post-Evaluation										
Part E: Experiential Learning 14. Mentorship and Internship										



Chapter 1: Getting Started

Timeline Explanation (Fall Start)

Winter Start programs: See Winter Start Timeline Explanation in Dropbox, Chapter 1

4 Months Before First Class (June/July):

- 1) Recruit and meet with your Advisory Committee up to three times. During the first meeting or two, introduce the Beginning Farmers class concept and the variety of prepared materials already available (see presentation template available from Boulder in Dropbox), hear from the advisory committee on issues affecting beginning farmers in your community, decide on elective courses and identify potential speakers. At the first meeting, schedule a follow-up meeting for additional program scoping (if necessary) and application review.
- 2) Secure a facility with classroom seating, appropriate technology/media and space for a weekly meal.
- 3) Identify and begin pricing potential caterers or food service (focused on procuring local foods where possible) to bring in meals for the pre-class dinner each week.
- 4) Decide the best time to hold a set of 8-week classes, considering the starting dates in conjunction with the agricultural season, and the day of the week that will be most convenient, while avoiding holidays and other busy times. In the past, Coordinators have tended to schedule the classes during weekday evenings, e.g. Mon, Tue or Wed from 5:30-8:30p.
- 5) Finalize an application form and informational brochure or flyer customized to your locale that you will use for marketing your program and recruiting class participants (*see Chapter 6 for examples*).
- 6) Decide on a fee schedule for your course and whether you will have different costs for different levels of participants (an example from this year's Colorado program is New Farmers=\$200 for all 8 sessions; Intermediate farmers=\$100 for all 8 sessions; and Experienced Farmers=\$80 for all 8 sessions) (*see Chapter 6 for more information*).
- 7) Meet with potential speakers for each class. Discuss the focus of the program, the learning goals for their specific class, and share developed curriculum templates so they can build from them while clearly targeting the unique content you want them to deliver. Discuss compensation and collect appropriate paperwork for speaker honoraria (*see Chapter 4 for more information*).

2 Months Before First Class (Early August):

- 1) Using your informational brochure or flyer, advertise the program and distribute application forms via the web, email, farmers' markets, and business or association meetings concerning agriculture in your area. Use your Advisory Committee to contact potential class participants as well.
- 2) Identify the materials you need (i.e., any books that need to be ordered, handouts, worksheets) and contact state co-leads to discuss what items are available and which you will need order, print, etc. Each Building Farmer curriculum module includes recommended supplemental materials (*see Chapters 9 and 10 for more information*).

1.5 Months Before First Class (Late August):

- 1) Receive applications and payment
- 2) Meet with your Advisory Committee to evaluate applications and select final participants for the program.
- 3) Notify applicants as to whether they were accepted into the program or not.
- 4) Do a short budgeting exercise to make sure application fees and grant resources will cover program materials, speakers and food costs.
- 5) Assemble contact list of participants including dietary restrictions and planned dates of attendance (*see Chapter 7 for more information*).

1 Month Before First Class (September):

- 1) Email all participants the online, pre-course survey (results will be returned to you for your information; we are using this to track how well the participants meet their learning goals).
- 2) Confirm caterer or food service entity (focused on procuring local foods where possible) to bring in meals for the pre-class dinner each week.
- 3) Determine homework assignments based on course schedule and class content (*see Chapter 10 for examples*).
- 4) Decide what additional handouts you will need to copy and what resource materials you would like to make available to your participants.

2 Weeks Before First Class (October)

- 1) Email participants a reminder about the pre-course survey, any homework that needs to be completed before the first class and confirmation of the time, dates and location of the classes.

First Class (October):

- 1) At first class, hand out print copies of the self-assessments and scoring grids to each participant (*see Chapter 10 for more information*).
- 2) If you are delivering an 8-week course, the last one or two weeks are dedicated to business plan presentations by the participants. Give guidelines for these presentations so participants can start preparing as soon as possible (*see Chapter 12 for more information*).

Ongoing Classes (October-December):

- 1) Send out weekly homework to be completed before each class (*see Chapter 10 for more information*).

1 Month Before Last Class (November):

- 1) Recruit experienced farmers or ranchers as Mentors for Mentorships/Internships (*see Chapter 14 for more information*).
- 3) Distribute business plan presentation sign-up list and extend invitations to any guests that you would like to attend the final sessions (*see Chapter 12 for more information*).

Last Class (December):

- 1) Provide students who have presented their business plan a Certificate of Completion during “Graduation” Ceremony. Take a picture of the graduates with their certificates for our files and marketing on Facebook (*see Chapter 12 for more information*).
- 2) Send students Post-Evaluation survey. Follow-up to ensure completion (*see Chapter 13 for more information*).
- 3) Advertise for Mentorships/Internships (*see Chapter 14 for more information*).

Experiential Learning

1 Month After Last Class (January):

- 1) Mentorship/Internship applications due mid January.
- 2) Review Mentorship/Internship applications with potential Mentors in late January.

2 Months After Last Class (January/February):

- 1) Launch Mentorships/Internships with Kick-off Dinner
- 2) Mentorships officially start

Official Start of Internship (March/April):

- 1) Internships officially start

3-5 Months After Start of Mentorship/Internship (June - August):

- 1) Mentor and Mentee Farm Tours
- 2) (Optional) Mid-season Mentorship/Internship evaluation

6-7 Months After Start of Mentorship/Internship (September):

- 1) Recommended end date for Internships

8-9 Months After Start of Mentorship/Internship (October):

- 1) Mentorships officially end

11 Months After Start of Mentorship/Internship (December):

- 1) Mentorship/Internship Year-End Dinner
- 2) Mentorship/Internship evaluation



Chapter 1: Getting Started Resources

The following resources can be found in the Chapter 1 Folder on Dropbox

- 1) BFW Coordinator Decision Tree
- 2) Timeline Explanation (Winter Start)



Chapter 2: Advisory Committee

Role of Advisory Committee

The Building Farmers in the West program is based almost entirely on the direction provided by the Advisory Committee. Advisory Committee's are engaged throughout the entire program lifecycle from initially evaluating the need for a program to providing feedback on the participants' business plan presentations and even sometimes serving as Mentors for the Experiential Learning. Strong Advisory Committee buy-in and participation is far more than lip service, it is essential for the success of a Building Farmers in the West program.

Who should be on Advisory Committee?

- 1) Six to eight Advisory Committee Members including one to two ag professionals, one to two food system experts, and four to six producers (primarily well-connected, direct market producers)
- 2) The best candidates for Advisory Committee Members are well connected to the wider ag community in your area, recognized as leaders in the local agriculture network, and willing to help educate future generations of farmers. Ideally, they would also be very experienced and able to offer feedback to producers as they explore potential business opportunities

Role of Advisory Committee Members

- 1) Provide ideas and guidance on to following:
 - Readiness of community/appropriateness of Building Farmers program
 - Opportunities & challenges for Building Farmers program and its graduates
 - Most relevant subject matter
 - Potential producer-speakers
 - Potential participants
 - Marketing/promotion ideas
 - Application Process
 - Potential Mentors for Experiential Learning
- 2) Help define the depth and breadth of essential beginning farmers content. The Advisory Committee will help answer the question of what is an appropriate quantity of content relevant for Principles of Business Planning

and Management course versus Advanced Implementation classes (*see Chapter 1, Student Learning Pathway for more information*). During the discussion, it should be noted that the principle purpose of the “Principles” course is to introduce issues (“park them on the students’ radar”) versus providing an in-depth analysis of all ag business topics

- 3) Help define the balance of lecture content with the number of appropriate factsheets, readings, and/or worksheets. In the past, Coordinators have found that mixing delivery methods is more appropriate and more effective. Said another way: it is not always essential to have a speaker on an issue; sometimes a factsheet alone will suffice
- 4) Review and select applicants
- 5) (Optional) Attend any classes of interest and provide feedback during business plan presentations

Benefits to Advisory Committee Members

- 1) Enjoy meals at meetings (Encouraged, needs to be funded from local accounts)
- 2) Develop new networks
- 3) Build personal and industry capacity
- 4) Help guide local ag industry development
- 5) Better understanding of new ideas and new entrants to marketplace
- 6) Attend local Building Farmers classes for free!

Advisory Committee Timeline Summary (Fall Start)

June	<u>Meeting:</u> Initial meeting to evaluate desire/need for program (first year only)
July	<u>Meeting:</u> Follow-up meeting to advise on program electives and suggest speakers
August	Help advertise program
September	<u>Meeting:</u> Help review applications
October	Classes start (participate as much as possible)
November	Help identify or serve as Mentors for next year
December	Classes end (provide feedback on Business Plan Presentations)
January	<u>Meeting (optional):</u> Review program <u>Meeting:</u> Mentorship/Internship application review with potential Mentors.

Advisory Committee Timeline Summary (Winter Start)

September	<u>Meeting:</u> Initial meeting to evaluate desire/need for program (first year only)
October	<u>Meeting:</u> Follow-up meeting to advise on program electives and suggest speakers
November	Help advertise program
December	<u>Meeting:</u> Help review applications
January	Classes start (participate as much as possible)
March	Classes end (provide feedback on Business Plan Presentations)
March/April	<u>Meeting (optional):</u> Review program
Following November	Help identify or serve as Mentors for next year
Following January	<u>Meeting:</u> Mentorship/Internship application review with potential Mentors.

Chapter 2: Advisory Committee Resources



The following resources can be found in the Chapter 2 Folder on Dropbox

- 1) Handout on the Benefits of the Building Farmers Program
- 2) Example Advisory Committee Invitation Email
- 3) Example Advisory Committee Timeline
- 4) Example Initial Advisory Committee Meeting Agenda
- 5) Boulder County Introduction to Colorado Building Farmers presentation

The following resources can be found in the Chapter 7 Folder on Dropbox

- 1) Example Application Review Meeting Agenda

The following resources can be found in the Chapter 13 Folder on Dropbox

- 1) Example End of Year Advisory Committee Meeting Agenda

Building Farmers in the West

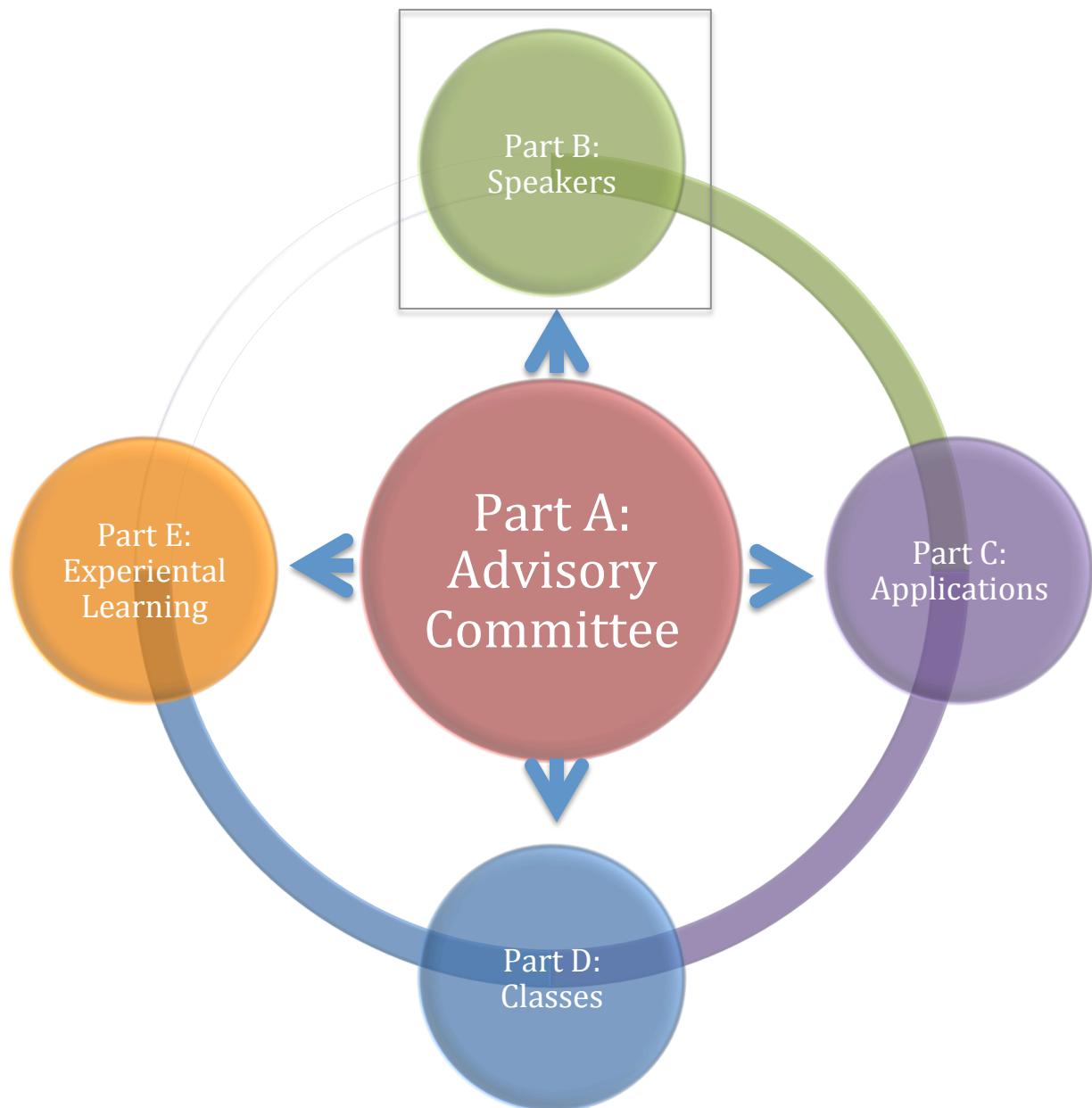


Part B: Speakers

Chapter 3: Developing the Program

Chapter 4: Speakers

Chapter 5: Food





Chapter 3: Developing the Program

Core Curriculum & Electives

Core Content:

Each BFW Program should tailor its classes to the needs of the local area as defined by the Advisory Committee (*for more information see Chapter 2*). However, we do ask that each program teach the three Core Curriculum classes of Building Farmers in the West:

- Strategic Business Planning
- Marketing Principles
- Enterprise Budgeting and Recordkeeping

We have developed some tools and guidelines to help you and your presenters successfully deliver each Core Curriculum session, including specific Learning Goals, PowerPoint templates (which can be modified), worksheets, and suggested readings that are helpful in building business plans. These are located in the Curriculum folder in Dropbox.

Elective Content:

The other class topics are elective and should incorporate the input of your Advisory Committee as well as the expertise of local speakers. We have also developed tools for some potential BFW electives as well. These are located in our Dropbox folder and include Food Safety, Agritourism, Value-added Processing, and Farm-to-School Programs.

Content Delivery Strategy:

Past program Coordinators have recommended the use of multiple content delivery methods including: out of class reading and worksheets and a combination of in class lectures, small group discussions, panel discussions, videos, and interactive projects to keep the learning environment engaging and dynamic.

Typical Class Schedules:

	<i>Schedule A</i>	<i>Schedule B</i>
5:30-6:15 p	Dinner	
6:15-6:30p	Transition (Homework Questions, Learning Goals)	
6:30-7:25p	Speaker 1/Topic 1	Speaker 1/Topic 1
7:25-7:35p	Break	
7:35-8:00p	Speaker 2/Topic 2	Speaker 1/Topic 1 (con't)
8:00-8:30p	Q&A/Discussion	



Chapter 3: Developing the Program

Key Learning Goals

For each goal consider the preceding language, "The learner will be able to..."

Strategic Business Planning Learning Goals

- Identify their business short term and long term goals, and a vision/mission statement for the business
- List clear action items for each short term and long term goal
- Explain how personal and customer values influence their business plan
- Perform SWOT analysis to identify potential marketing niche, customer base, location, etc.

Marketing Learning Goals

- Develop a strategic market position and strategy consistent with the mission developed in the business plan
- Create a marketing plan that includes product, pricing, placement and promotion goals and strategies
- Identify the 3 Cs (customers, costs and competition) and the 4 Ps (product, pricing, placement and promotion) within a strategic marketing plan (NOTE: start2farm.gov lists 4 Ps as "purpose, plan, product, and people" but these refer to the 4 Ps of Sustainable Ag)

Enterprise Budgeting and Recordkeeping Learning Goals

- Understand the importance of recordkeeping for decision making in business planning, including production and marketing
- Describe the differences between variable and fixed costs
- Develop a basic production plan including a calendar, estimated total output of product per market channel, and monthly labor estimates
- Estimate projected revenue by market channel
- Estimate net return to management (pay yourself)
- Understand labor as a financial risk factor (cost, source, cost of management)
- Identify recordkeeping tools (software, etc.) and strategies (when and how to input data, and how to use data to improve business management)
- Describe how marketing plan and cost estimates link to production plan
- Understand the need for basic financial statements and describe how they are used

Potential Electives

Choose electives with your Advisory Committee based on what is needed in your local community. Covering all of these topics may complicate the learning experience, so it is recommended that some of these topics be deferred to advanced classes and others be introduced but not covered in depth.

For each goal consider the preceding language, "The learner will be able to..."

Food Safety Learning Goals

- Describe recommended food safety practices for different sales channels (CSA, Farm Stand, Farmers Market)
- Develop an on-farm food safety plan based on Good Agricultural Practices
- Create SOPs for an on farm food safety plan
- Develop staff (and volunteer) food safety training programs

Agritourism Learning Goals

- Understand importance of planning for an agritourism business, prior to committing any resources to a new agritourism enterprise.
- Understand the difference between traditional marketing planning and implementation, and effective marketing for a food-based agritourism product or service, including the challenges in targeting interested travelers and pricing experiences (rather than products)
- Understand the concept of risk management in the context of liability and regulatory issues relevant to agritourism.
- Be able to adapt existing course tools (worksheets, additional resources and references) to plan for and develop an agritourism enterprise.

Value-Added Processing Learning Goals

- Describe a potential value-added product and evaluate how it fits into an existing business plan
- Describe several ways to develop pricing for a value-added products
- Describe the logistical and operational opportunities and costs related to developing a value-added product., including how to decide between investments in new facilities and equipment versus using a co-packer partner
- Understand the role of sound financial management in aligning production and marketing goals

Farm-to-School Program Learning Goals

- Understand the potential market opportunities offered by farm-to-school programs, for different scales of production
- Understand the school food procurement process and how to start a farm-to-school program
- Explore the unique packing, handling and distribution strategies necessary to service farm-to-school customers
- Describe considerations for integrating farm-to-school production into a business plan

Risk Management Learning Goals

- Identify potential risks to operation (e.g. legal, weather, labor, water, crop loss, market loss, financial)
- Identify personal risk thresholds and strategies for assessing “right-risk”
- Identify strategies to manage risk (e.g. insurance, enterprise diversification, business structure on farm food safety planning, risk assessments) and evaluate their applicability to operation.

Insurance Learning Goals

- Understand available insurance options (types of liability, crop, , workers' compensation)
- Understand how appropriate insurance instruments can help manage (albeit limited in some alternative markets) different types of risk (e.g.. U-Pick operation),

Managing labor (payroll, taxes, motivation) Learning Goals

- Forecast seasonal labor requirements
- Identify strategies for communicating daily/weekly employee work plans (including how to prepare for tasks, describe tasks, provide feedback and encouragement)
- Describe strategies for recruitment, hiring, retention and dismissing staff
- Understand strategies for worker motivation
- Identify risks and challenges in using volunteer labor
- Identify major issues in processing “pay roll”
- Labor saving strategies/ methods to reduce labor inputs (including technology)

Legal Learning Goals

- Describe the concept of liability and understand potential methods that can help limit liability
- Describe available organizational structures for ag businesses and list pros and cons for each structure (e.g. LLC, LLP, S Corp, Sole Proprietorship)
- Identify the purpose and frequency of common management practices, e.g. Board meetings, investor agreements
- Understand key issues in developing contracts and leases
- Understand legal issues associated with labor management. Describe the difference between staff and independent contractors?W9 and 1099 staff. Identify legal risks associated with volunteers.

Financing your Enterprise Learning Goals

- Describe common sources of farm, ranch, and food-based business financing (loans, grants, personal finances) and list pros and cons for each.
- Describe how financing is related to strategic planning.
- Describe key indicators for financial sustainability (based on FSA standards)
- Understand when external or community-based financing is appropriate for growing a farm business.



Chapter 3: Developing the Program Resources

The following resources can be found in the Chapter 3 Folder on Dropbox

- 1) Example Class Topic List and Schedule
- 2) Example Program Lineup from Yuma County
- 3) Example Curriculum from Larimer County
- 4) Example Curriculum from Denver County

The following resources can be found in the Chapter 3, Course Content Folder on Dropbox

- 1) Example PPT, Handouts, Worksheets and Readings for Core Curriculum classes
 - a. Strategic Business Planning
 - b. Marketing
 - c. Enterprise Budgeting and Recordkeeping
- 2) Example PPT, Handouts, Worksheets and Readings for Elective classes
 - a. Food Safety
 - b. Agritourism
 - c. Value-added Processing
 - d. Farm-to-School Programs

The following resources can be found in the Chapter 13 Folder on Dropbox

- 1) Example PPT for Student Business Plan Presentations (not for distribution)



Chapter 4: Speakers

Choosing Speakers

Ideally speakers should be local, expert farmers/ranchers who can speak professionally about the class topic. Good speakers will also be clear, engaging and able to rely on either their personal experience and/or research-based information. Each speaker is expected to prepare a PowerPoint presentation and any handouts that accompany their presentation; however, it is common for the Coordinator to actively assist speakers especially in the creation of the PowerPoint. The Coordinator typically makes copies of both the handouts and PowerPoint presentations for the class. Many of the topics we discuss in BFW classes are personal and/or proprietary, so we only ask that speakers reflect on the level of depth they are willing to go into about their own operation, finances, future business plans, etc. Additionally, when local speakers are not available for specific topics, in particular Core Curriculum topics, please talk with the BFW Leadership team as we can often help with those presentations.

Coaching Speakers

It is important to properly “coach” speakers, especially those who are not completely comfortable with public speaking and/or presentations about their businesses. This can often require 2-3 meetings before their presentation including final content review before their presentation. These meetings should be planned at least 4-6 weeks before the presentation date and should focus on specific BFW Learning Goals (*see Chapter 3 for more information*). We have also developed some tools that can help you clearly communicate your expectations to speakers as well as confirm that you have the paperwork required to compensate them for their time. (Resources found in Chapter 4 Folder on Dropbox).

Compensating Speakers

“Qualified speakers” can be compensated for up to 8 hours of preparation and delivery

- “**Qualified speakers**”=only farmers and ranchers who are teaching your class. Each speaker can be compensated for up to 8 hours of preparation and delivery (or \$200 total at \$25/hour). Mileage may be reimbursed for any speakers traveling from out of county at the current reimbursement rate (\$300 total is available from the CSU/USDA grant for travel reimbursement for each 8-week program, but you can build extra into the registration costs

- of you feel it is needed, reasonable, and still affordable for beginning farmers). The total amount available from the CSU/USDA grant for speakers and mileage in each 8-week program is \$3000. If you find local sponsors, you can provide more, but please inform the BFW Leadership Team of that decision so we are aware of successful models of recruiting local sponsors.
- If you are paying speakers directly from the grant, please make sure you obtain a W-9 (federal taxpayer identification form found in Dropbox) from each speaker you intend to pay, or verify that CSU already has the payee's W-9 on file. This needs to be submitted only one time. Each speaker also needs to submit an invoice that gives the total amount to be paid (NO hourly information), and a description of the work done such as "presenting at 'Your' County Building Farmers program on <date>". Send the speaker's invoice to the designated CBF administrative liaison (with name of speaker, address, phone number, and speaker's signature). Check with Martha Sullins to obtain current information on payment requests.



Chapter 4: Speakers Resources

The following resources can be found in the Chapter 4 Folder on Dropbox

- 1) Example Speaker Pre-Presentation Meeting Checklist
- 2) Example Speaker Brief for Core Curriculum Classes
 - a. Strategic Business Planning
 - b. Marketing
 - c. Enterprise Budgeting and Recordkeeping
- 3) Example Speaker Invoice
- 4) IRS Form W9



Chapter 5: Food

Choosing a Caterer

Past Coordinators have emphasized the importance of high quality food that people enjoy as an integral component in building the community of growers that often results from the program. Ideally caterers should be willing to use food from local farmers and ranchers, sometimes even from producers in the class. Advisory Committees are often able to make recommendations based on their previous experience and connections. Also, caterers charge dramatically different prices so it is important to understand the range of prices in your area before setting the registration price.

Coaching Caterer

The caterers will need to know the dates of your program, the number of meals needed each night, and dietary restrictions for your group. See example tracking documents in Dropbox. Work with your caterer to control costs as some caterers prepare enough food for one to two extra people, while others allow for even more generous amounts. It might help to ask them how much flexibility there is in the quantity of food delivered and to also observe how much food is left each night. Additionally, it is important to confirm with your caterer that they understand it may take up to a few weeks to receive payment AFTER each class.

Compensating Caterer

No food is compensated through current grant funds, so it must be entirely paid for through registration fees or other local funds that you acquire. Since caterers will be paid from your local account it is essential to work with your county office staff, organizational bookkeeper, and/or accounting tech to make sure you have accounts established that allow you to collect program revenues and spend that money on food and other related program supplies in a timely matter.



Chapter 5: Food Resources

The following resources can be found in the Chapter 5 Folder on Dropbox

- 1) Example Menu from Past Classes
- 2) Example Caterer Invoice
- 3) IRS Form W9
- 4) Draft Spreadsheet for Tracking Catering Payments
- 5) Draft Spreadsheet for Tracking per Night Meal Count & Dietary Restrictions



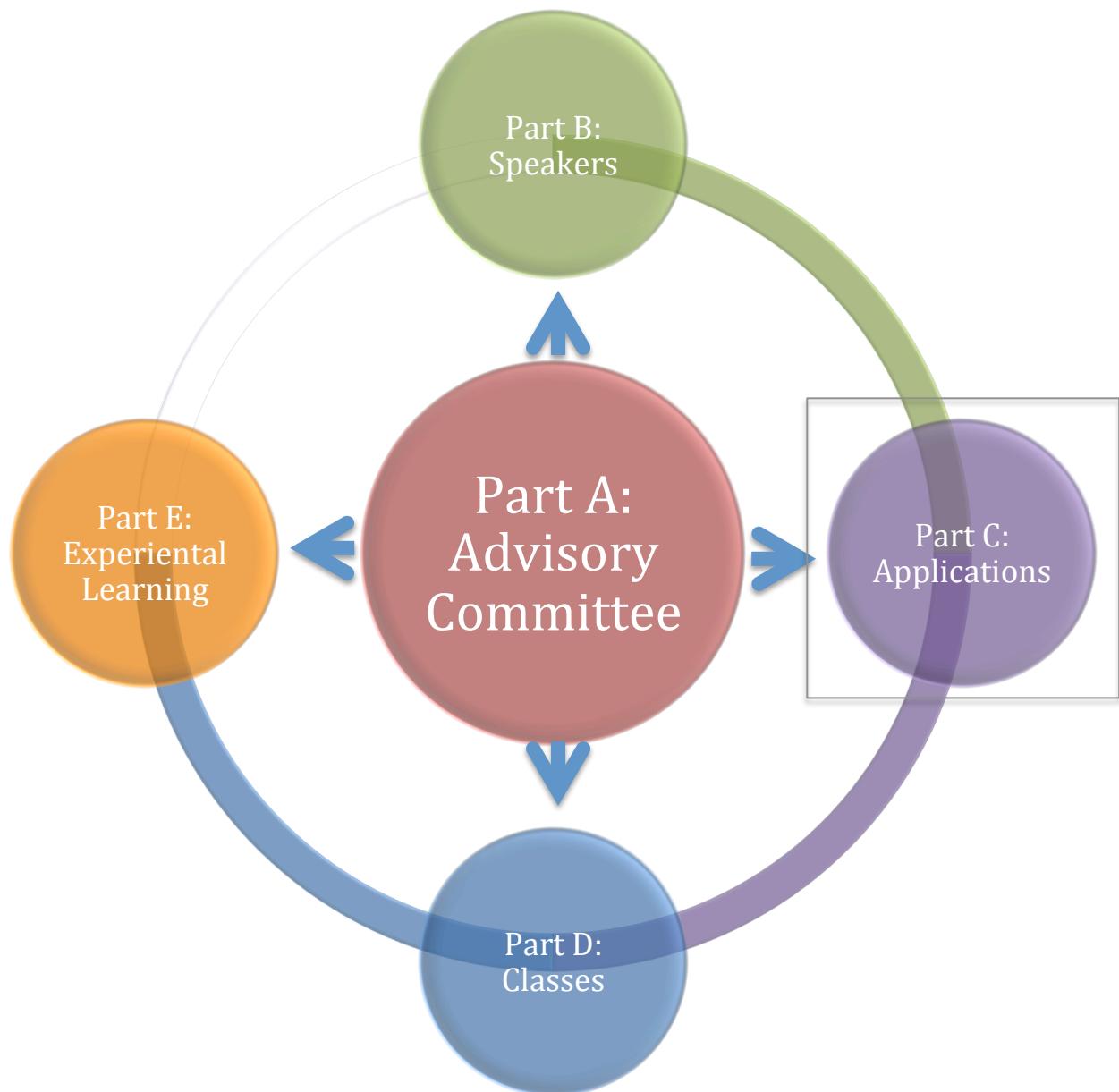
Building Farmers in the West

Part C: Applications

Chapter 6: Promotion

Chapter 7: Applications & Registration

Chapter 8: Pre-Evaluation





Chapter 6: Promotion

Pricing Your Program

Pricing your program is arguably one of the most complex parts of the Building Farmers Program. As our grant funds do not cover food and related supplies, your advertised price will need to cover those costs at the very least. You may wish to adjust prices further so you can offer scholarships or purchase additional materials that would not qualify for grant reimbursement, however, it is essential that these classes remain accessible to beginning farmers (i.e. no more than \$200). In the past, programs have been priced on a flexible scale where new farmers pay the most (\$150-\$200), followed by intermediate farmers (\$80-\$150), and experienced farmers pay the least (\$50-\$80).

Additional considerations should be made for mileage reimbursement that may need to be offered to speakers for more remote programs as well as the cost of the meals for the Coordinators, the speakers, and your Advisory Committee Members - all of whom traditionally attend for free and thus do not pay for their own meals. Lastly, some Coordinators have elected to collect registration fees in 2-3 payments (to permit smaller payments for those with cash flow issues), although this does create additional complexities in monitoring each participant's account balance (*see Chapter 7 for more information*).

Developing Promotional Materials

We have developed a tri-fold brochure template that you can feel free to edit and modify for your local program. You are, of course, welcome to develop your own materials as well, although we ask that you use the Building Farmers in the West logo and the required USDA NIFA acknowledgment image and text. You can find both of these in the Dropbox folder as well.

Typically applications (*see examples in Dropbox, Chapter 7*) are received along with registration fee payments (or installments if the program Coordinator will allow for extended payment schedules as detailed above). Checks are then returned to individuals who are not accepted (*see Chapter 7 for more details*).

Promoting Your Program

Market the program widely to ensure participation. Extension networks are fine, but you may need to contact farmers' market managers, community gardens and/or other food and ag businesses/organizations in your region to be thorough. Ask Advisory Committee members and speakers to help promote the program to their networks, listservs, etc.. Also, remember to market to existing farmers too - the best BFW Programs integrate experienced farmers!



Chapter 6: Promotion Resources

The following resources can be found in the Chapter 6 Folder on Dropbox

- 1) Example Tri-Fold Brochure from:
 - a. Larimer County
 - b. Pueblo County
 - c. LaPlata County
 - d. Boulder County
- 2) Example Poster/Flyer from
 - a. Pueblo County
 - b. La Plata County
- 3) Example News Release from Chaffee County
- 4) Example Radio PSA from Chaffee County
- 5) Colorado Building Farmers Logo
- 6) Building Farmers in the West Logo
- 7) Required USDA NIFA Acknowledgment Image and Text



Chapter 7: Applications & Registration

A full application consists of a completed application and a check for the appropriate registration fee. The advisory committee should meet shortly after the application deadline to discuss and score all full applications received prior to the application deadline.

Draft Applications

Building Farmers in the West distinguishes three producer experience levels within the relevant USDA definition of Beginning Farmers and Ranchers:

- *New Farmer*: Less than 1 year intern/apprentice level experience on more than 1/4 acre farm/ranch
- *Intermediate Farmer*: 1-3 years experience as production/marketing manager or sole operator on more than 1/4 acre farm/ranch
- *Experienced Farmer*: More than 3 years experience as production/marketing manager or sole operator on more than 1/4 acre farm/ranch

Application Tracking Process

As you receive completed applications and checks for registration fees, it can help to enter all participant information into an Excel spreadsheet. This spreadsheet will provide you the information needed to order the appropriate number of meals, take attendance and keep other needed records (*for an example tracking tool, see Dropbox, Chapter 7*).

Application Review Process

When you promote your program, you should indicate the date by which all applications need to be returned, typically late August or early September. Schedule a meeting with your advisory committee shortly after that date so you can quickly respond to applicants.

Preparation for Application Review Meeting:

- 1) Invite Advisory Committee
- 2) Make copies of all applications and scoring rubrics
- 3) Order food

Application Review Procedure:

- 1) Read and score applications
- 2) Discuss each application. Does the applicant:
 - a. Have the correct experience level?
 - b. Fit with policy (see below)?
 - c. Fit with class?
 - d. Offer a unique perspective from their other life experiences (i.e. was an accountant or marketing manager in previous job so they can offer some insights from outside food and agriculture)
- 3) Discuss whether you will obtain an ideal experience level mix within class. Past Coordinators have tended to aim for 15% experienced farmers, 35% intermediate farmers and 50% new farmers with a greater preference towards more experience.
- 4) Use scores to establish a minimum score for each experience level. This is a useful, quantitative benchmark that helps to communicate why some applications were accepted while others were not.

Application Review Policies: "Making the best better"

- 1) Priority to Intermediate and Experienced Farmers
- 2) Goal is to start farm within one year
- 3) Business-oriented approach
- 4) Realistic business model
- 5) Feasible personal character for farming/ranching

Balancing the Composition of the Class

In the past, program Coordinators have recommended 8 to 10 students as the minimum number needed to generate a wider sense of openness and sharing within the cohort.

Particular attention should also be given to balancing the composition of the class and ensuring that the overall mixture of experience is as balanced as possible. In the past classes that have had too many new/intermediate farmers have lacked the ability to critically evaluate the practicality of their peers' business plans and have ended up being less effective than classes that include a number of more experience farmers and/or more engaged advisory committee members. Thus classes with more experienced participants make for a richer learning environment.

Communicating with Applicants

After the Advisory Committee has met and reviewed applicants, you will need to email the applicants and let them know if they were accepted at the level they applied, if they were accepted but at a level different than they applied or if they were not accepted. It is fairly important to be thoughtful on this decision, as it has more than registration fee implications (see discussion on composition of class above). In your email include information about how to complete the program pre-evaluation and any amount owed (if they were accepted at a level different than the level at which they applied).

(Optional) Online Applications

In the past, some Coordinators have accepted online application forms through Google Forms (*see Online Application How To in Dropbox, Chapter 7*). Though this strategy has some distinct advantages, it also requires the extra step of sending out a registration fee request and then waiting to receive the registration fees for accepted students.

Speaker/ Advisory Committee Member Registration

Even though they are not asked for payment, speakers and Advisory Committee Members should be sent a Registration Form. You may want to add the speakers and Advisory Committee Members to your tracking spreadsheet as well to help keep track of meals, dietary restrictions, etc.

Registration Fees

After you have reviewed the applications and accepted students into your class, you will need to return registration fees to those who were not accepted and ask for additional funds from those who were accepted at a lower level of experience than that for which they applied. There are examples of emails you can use in Dropbox, Chapter 7.

All registration fees collected need to be processed in your local account. Your program income funds will be used to cover all of your catering and other food related expenses, which cannot be covered under this grant. It is important to make sure that these funds will be available so you can use them to make timely payments to caterers, etc.

(Optional) Some Coordinators have provided students the opportunity to pay their registration fee over 2-3 installments. If you choose to use this method, it might be beneficial to review your cash flow and ensure you will have sufficient money for the weekly catering invoice.



Chapter 7: Applications Resources

The following resources can be found in the Chapter 7 Folder on Dropbox

- 1) Blank Applications
 - a. New Farmer Application
 - b. Intermediate Farmer Application
 - c. Experienced Farmer Application
- 2) Application Scoring Rubrics
 - a. New Farmer
 - b. Intermediate Farmer
 - c. Experienced Farmer
- 3) Example Spreadsheet for Tracking Registration Fees
- 4) Example Application Scoring Matrix
- 5) Example Post Application Review Emails
 - a. Acceptance Letter
 - b. Accepted at Lower Level of Experience Letter
 - c. Not Accepted Letter
 - d. Registration Fee Follow Up Letter
- 6) Online Application: How To Guide
- 7) Speaker and Advisory Committee Member Registration Form
- 8) Example Application Review Meeting Agenda



Chapter 8: Pre-Evaluation

Pre-Course Evaluation Survey

Every student who participates in the program needs to complete a pre-course evaluation. The pre-course evaluation provides benchmark information on student knowledge levels and attitudes and helps to provide information to the local program Coordinator on participant backgrounds, past experience, and needs. The results of the survey should also help the local program Coordinator customize the content and pace of the course.

- 1) Please ask registered participants to complete the evaluation online. Contact Martha Sullins for the appropriate link, as these may be customized for each class.
- 2) Those who have not completed the evaluation online prior to the first class will need to complete an electronic or paper version at the first day of the course. If paper evaluations are used, the Coordinator will need to enter the results into the online system, using the same process.
- 3) Work with Martha Sullins to confirm that all evaluations have been entered.

(Optional) It might help to let the participants know that these evaluations are a key component of our impact reporting to the USDA Beginning Farmer and Rancher Development program and that such funds help make these classes possible at a low cost to the farmers.

CSU Media Release

We also ask that every student complete a CSU Media Release Form so we can use photos and/or videos taken of the class on our website, Facebook, reports to funders, or other marketing materials. On the last day of class, in particular, we would like each group to gather for a final class picture that can become part of our record of success. However, if students do not wish to have their photo taken and posted online, it is important we respect their wishes.



Chapter 8: Pre-Evaluation Resources

The following resources can be found in the Chapter 8 Folder on Dropbox

- 1) CSU Media Release Form
- 2) Example Spreadsheet for Tracking Signed Media Releases and Completed Pre-Evaluation Surveys
- 3) Sample Pre-Course Evaluation Survey Instrument
- 4) Example Spreadsheet for Analyzing Results of Pre-Evaluation Survey
- 5) Example Summary of Pre-Evaluation Survey Results



Building Farmers in the West

Part D: Classes

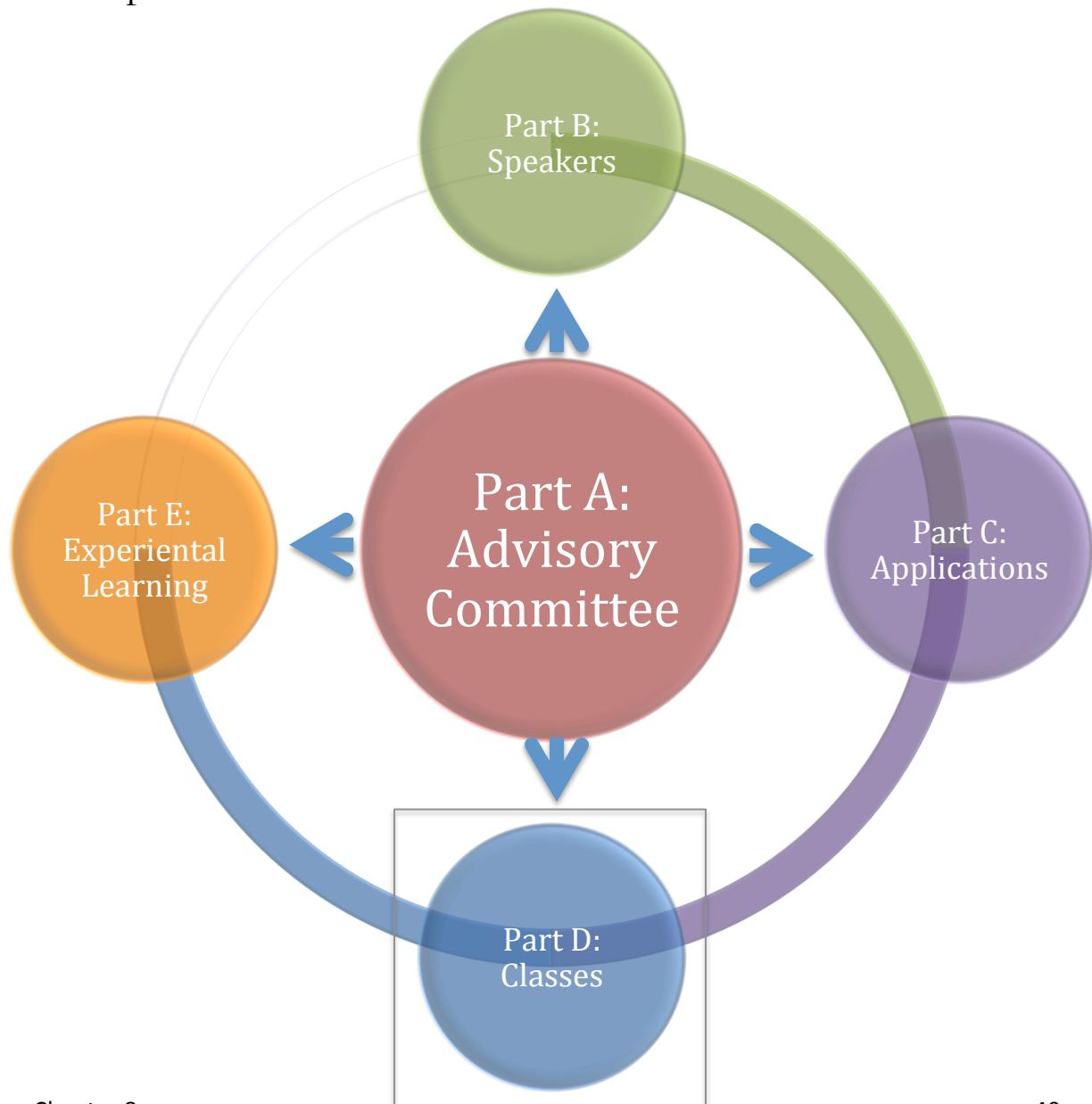
Chapter 9: Notebook

Chapter 10: Weekly Schedule & Homework

Chapter 11: Classroom Management

Chapter 12: Business Plan Presentations

Chapter 13: Post-Evaluation





Chapter 9: Notebook

Recommended Program Materials

Once you know how many students will be in your program, we recommend purchasing the following for each student:

- Notebook: 1½"-3" 3-ring binder
- 8 tab dividers (or the number of classes in your program)
- Name Tag Printer Paper (Avery 3" x 4")
- Plastic Name Tag Holders (3" x 4")
- 8½" x11" Certificate Frame
- 8½" x11" Certificate Paper

Preparing the Notebook

In the past, programs have provided each student with a program notebook to help them keep track of the course syllabus, PowerPoint presentations, homework, worksheets and handouts. A notebook cover page template is available in the Dropbox folder as well. While most Coordinators have provided 3-hole punched handouts, worksheets, etc. on a weekly basis for the 3-ring notebook, others have found that providing students with a notebook and all the handouts at the first class also works well for distributing course materials. (Optional) Coordinators can alternatively provide participants with the entire notebook and handouts on a USB drive on the first day of class.

Reimbursement for Qualified Material Expenses

The grant (Building Farmers in the West) will pay for qualified materials related to the classroom and Experiential Learning programs.

Qualified materials expenses=photocopying materials to distribute to class participants, notebooks, name tags, certificates of completion and some related office supply expenses. Please note that we **cannot cover any food-related expenses** in this category. The total materials budget for each 8-week program is \$700.

- Typically you will request reimbursement for material expenses you have already incurred, so please submit a payment request using the Pay Request form in Dropbox.
- Send these requests for reimbursement to the CBF administrative liaison (check with Martha Sullins for specifics) who will make the request through the CSU Ag Business Center.



Chapter 9: Notebook Resources

The following resources can be found in the Chapter 9 Folder on Dropbox

- 1) Example Notebook Cover Page
- 2) Example Name Tag Template
- 3) Payment Request Form
- 4) Example Fax Cover Sheet



Chapter 10: Weekly Schedule & Homework

Before the First Class

One to two weeks before the first class, you might want to send an email to students reminding them about completing the pre-course survey as well as starting on some of the online, introductory reading materials. A list of potential homework assignments can be found in *Dropbox, Chapter 10*.

First Class

Coordinators distribute print copies of the Self-Assessment tools along with the Scoring Grids and Charting Your Path documents found in Dropbox during the first class. This set of tools provides producers with an opportunity to assess their current level of knowledge across a wide range of agricultural areas. This tool will help students identify their personal strengths and weaknesses and, along with the Charting Your Path document, help them determine additional avenues for appropriate professional development. The Charting Your Path document can also be refined to reflect opportunities in your local area.

Weekly Homework

Coordinators assign required and recommended weekly readings, worksheets, webinars, YouTube videos, etc. to prepare participants for in-class content. A list of weekly homework ideas has been compiled for each of the core content areas, but Coordinators will need to determine appropriate resources for their program electives.

Though not all students will complete the extracurricular work, those that do often demonstrate more refined thinking in their Business Plan presentation. The worksheets in particular help students incrementally prepare for the Business Plan presentation.

(Optional) Approaches to Homework

In the past, some Coordinators have assigned homework and then asked “pop quiz” type questions at the beginning of each class while others have even gone as far as asking students to turn in worksheets for Coordinator comments to give real-time feedback that may contribute to a more serious effort on homework.



Chapter 10: Weekly Schedule & Homework Resources

The following resources can be found in the Chapter 10 Folder on Dropbox

- 1) Example Weekly Homework Assignments from
 - a. Boulder County
 - b. Larimer County
 - c. Denver County
- 2) (Do Not Email) Self Assessment: Crops
- 3) (Do Not Email) Self Assessment: Livestock
- 4) (Do Not Email) Self Assessment: Personal, Business Management and Marketing Capabilities
- 5) (Do Not Email) Scoring Grid: Crops
- 6) (Do Not Email) Scoring Grid: Livestock
- 7) (Do Not Email) Scoring Grid: Personal, Business Management and Marketing Capabilities
- 8) Charting Your Path

The following resources can be found in the Chapter 9 Folder on Dropbox

- 1) Example Syllabus with Weekly Schedule & Homework

The following resources can be found in the Chapter 3 Folder on Dropbox

- 1) Each Core Curriculum and Elective Class has a sub-folder of relevant Homework & Handouts



Chapter 11: Classroom Management

In the classroom, the Coordinator often acts like a secondary or post-secondary classroom teacher who has invited in guest speakers for specific learning modules. As such, there are several other crucial functions of the Coordinator:

Setting up the Room

Before dinner begins, set up the tables, chairs, screen, projector, laptop, and speakers' materials. Also, have nametags and other handouts ready for participants to pick up as they enter, as some participants will likely continue to arrive even after the class program begins.

Dinner and Ambience

- Ask the caterer to arrive 30-45 min before the start of dinner so there is plenty of time to get set up before students arrive (some will arrive early).
- Think about playing locally appropriate music (e.g. Americana, Country, Bluegrass) during the meal to encourage a comfortable, informal atmosphere that will encourage students to relax and converse. This informal conversation time is critical for community building.
- About 15 min before you want the first speaker to start, encourage folks to use the restroom, get coffee and dessert, and find their seat.

Coordinator Introductions and Interjections

- At the beginning of each class, the Coordinator should ask students questions regarding the homework, introduce the speakers and reiterate the learning goals for the evening and how those goals relate to the overall process of business planning. See Dropbox for examples.
- After the first speaker starts, take attendance.
- At times during the presentation it may be important to briefly interject and highlight a specific point, present critical information, or qualify a perspective offered by a speaker. As the program Coordinator, you have the important job of tying the material together for your participants and making sure they understand the rationale for each presentation and assignment they are asked to engage in. Since most speakers will not have the context of seeing previous weeks' presentations (or know as much about what is planned in the future), you are an important "framer" of the course.

Wrapping up the Class

- The last 30 minutes of the class are usually devoted to Q& A between the class and the speaker(s). The Coordinator should prepare 3-5 questions to ask the speaker(s) that will stimulate discussion if the participants are not engaging into the complexity of the subject matter. Questions should focus on learning goals, topics that may motivate good group discussion, and issues critical to the business planning process.
- The last 5 minutes of class can be used to remind students about the coming week's homework, provide a preview of the coming weeks topic and to encourage students to begin/continue work on their business plan presentations.



Chapter 11: Classroom Management Resources

The following resources can be found in the Chapter 11 Folder on Dropbox

- 1) Draft Spreadsheet for Tracking Attendance
- 2) Example Dinner Discussion Topics (Table Card)
- 3) Example Class Intro Questions Based on Homework



Chapter 12: Business Plan Presentations

Preparing Students for Business Plan Presentations

- Present the Business Plan Specification Handout and Presentation Evaluation Form at the first or second class and encourage students to complete their homework as a way to think through the essential elements of the business plan.
- Students should know that the presentation is only a summary of their business plan; however, it is a unique opportunity to practice a “bank”/“board” pitch showing their personal passion, commitment and preparation.
- Coordinators and/or Advisory Committee Members may want to offer students an opportunity for one-on-one feedback before or after they present.
- During the 2nd or 3rd class, distribute the business plan presentation sign-up list.
- Students are required to present a business plan to be awarded a Certificate of Completion for the class.
- The Certificate of Completion is the prerequisite for applying to the Experiential Learning program, other perks associated with program completion, and any Advanced CBF Class.

Business Plan Presentation Feedback

- Depending on the number of presentations, presentations usually last 10 minutes with 5 additional minutes for questions/feedback from the audience.
- The audience is provided with a Presentation Evaluation Form so they can give more directed feedback in the areas of BFW Key Learning Goals (*see Chapter 3: Key Learning Goals*).
- These forms can be collected at the end of each presentation and distributed to the speaker so they have a lot of input about the areas in which they should focus their planning efforts.
- (Optional) Some Coordinators are able to use electronic Turning Point clickers (provided by their county) to generate automatic, but concealed feedback for speakers. Even with electronic clickers, we recommend that audience members still write down specific feedback for each presentation as past participants have appreciated these customized words of advice.

Certificates of Completion and “Graduation”

- Students who present Business Plans should receive a Certificate of Completion.
- Please take a final Class Photo with students holding Certificates.
- Though not required, a “Graduation” ceremony in which certificates are presented to each student in front of the class can be a great way to end the whole program and celebrate the community that was built among participants. Inviting your Advisory Committee, donors and organizational partners may even be appropriate.



Chapter 12: Business Plan Presentations Resources

The following resources can be found in the Chapter 12 Folder on Dropbox

- 1) Business Plan Specifications Handout
- 2) Business Plan Presentation Evaluation Form
- 3) Draft Certificate Format (File Format is Microsoft Publisher)
- 4) Draft Presentation Sign-Up List
- 5) Example Business Plan Presentations (DO NOT DISTRIBUTE-these are for program Coordinator reference only)



Chapter 13: Post-Evaluation

Post-Course Evaluation Survey

The purpose of the post-course evaluation survey is to measure changes in knowledge and attitudes and identify which actions participants expect to take as a result of attending the course.

Participants should complete the online evaluation within **two weeks** of the last class to provide a consistent set of responses across programs about meeting short-term learning objectives. Please notify Martha Sullins for the appropriate link and work with her to ensure that all evaluations have been entered either by the participants online or by someone in your office if you have received paper copies from participants.

Follow-Up Evaluation (Sent by Leadership Team)

Additional follow-up evaluation will be conducted by the Leadership Team to see what actions/changes participants have taken since the program, what knowledge they have gained as a result of their participation, and how these changes have resulted in social and economic benefits to them. Phone interviews will be conducted with participants 9 and 18 months after course completion. The Leadership Team will contact the local Coordinator prior to follow up with individual participants.

(Optional) End of Year Advisory Committee Meeting

Some Coordinators have met with their Advisory Committee shortly after the last class to review the program (what went well? what needs improving?) and to discuss future programs. This discussion can also be combined with the Mentorship/Internship application review meeting (*see Chapter 14 for more information*).

(Optional) Local Post-Course Survey

In addition to the online post-course survey, some Coordinators have developed a short paper-based survey asking participants for feedback about specific elements of the course (quality of speakers, quality of food, amount of homework, etc.) that are not covered in the online survey. It is the program Coordinators choice whether to complete this and they may customize it to serve their professional or organizational needs.



Chapter 13: Post-Evaluation Resources

The following resources can be found in the Chapter 13 Folder on Dropbox

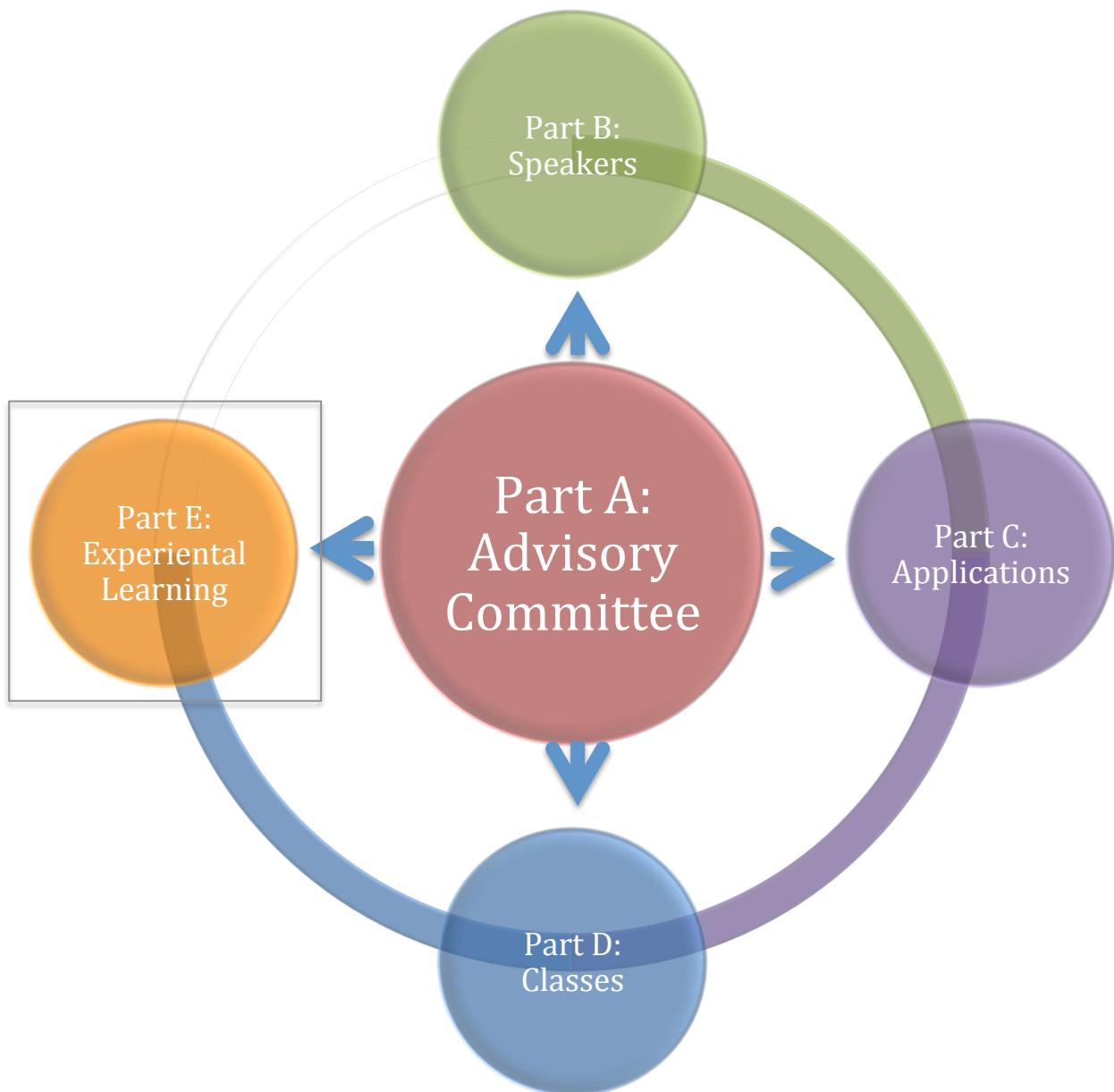
- 1) Sample Post-Evaluation Survey Instrument
- 2) Example Spreadsheet for Tracking Completed Post-Evaluation Survey
- 3) Example End of Year Advisory Committee Meeting Agenda
- 4) Example Spreadsheet for Comparing Results of Pre and Post Evaluation Survey



Building Farmers in the West

Part E: Experiential Learning

Chapter 14: Planning for Experiential Learning





Chapter 14: Planning for Experiential Learning

Timeline for Experiential Learning

Terms Used:

Mentor: experienced farmer teacher

Mentee: works on his/her own farm and has periodic contact with Mentor

Mentorship: relationship between Mentor and Mentee

Intern: works on Mentor's farm

Internship: relationship between Mentor and Intern

Intro to Experiential Learning

Currently, BFW offers two types of Experiential Learning: Internships and Mentorships for those who have completed the Principles of Business Planning Class. While both Internships and Mentorships are designed to provide beginning farmers with hands-on training under the guidance of an experienced Mentor, there are a few important differences:

Internships are for new farmers who do not yet have a farm of their own. An Intern gets paid to work at the Mentors farm for approximately 20 weeks and during that time is expected to contribute meaningfully while also getting exposure to key aspects of farm business planning and management.

Mentorships on the other hand are for intermediate or experienced farmers who are actively managing their own farm enterprise. Mentors are paid to provide advice on marketing, production, operations, etc. for an entire season.

While some students will be ready immediately after the Principles class, most will need one or more additional years of active farm work before they are ready for the Internship OR one or more additional years of active farm management before they are ready for the Mentorship.

Timeline for Internship/Mentorship

November	Identify eligible Mentors in the community (Advisory Committee often serve in this capacity) Recruit experienced farmers or ranchers as Mentors for both Mentorships and Internships
December	Advertise for Mentorships/Internships
January/ February	Mentorship/Internship applications due mid January <u>Meeting:</u> Review applications and match Mentees and/or Interns with potential Mentors Mentorships officially start *
February/March	<u>Meeting:</u> Launch Mentorships/Internships with Kick-off Dinner
March/April	Internships officially start Begin to schedule farm tours
June-August	(Optional) Mid-season Mentorship/Internship evaluation Mentor and Mentee farm tours
September	Recommended end date for Internships
October	Mentorships officially end
December	<u>Meeting:</u> Mentors, Mentees and Interns End of Season dinner or lunch (paid for by participants) and evaluation

* Some Coordinators may choose to start mentorships earlier to best align with pre-season planning period.



Chapter 14: Planning for Experiential Learning

Recruiting Mentors

The success of Experiential Learning depends largely on the quality of the Mentor and an appropriate match between the Mentor and the Mentee/Intern.

High Functioning Mentors:¹

- Have good communication and people management skills
- Are exceptional producers and have considered how to convey their knowledge and skills to a beginner.
- Understand that each beginning farmer learns differently and has patience to guide those with less knowledge on topics.
- Will vary their teaching approach to best fit the learning style and knowledge of the beginning farmer.
- Understand why they engage in various business and production strategies and can explain their reasoning from a systems perspective.
- Establish clear boundaries for their personal time and respect those of the beginning farmer.
- Give appropriate constructive criticism balanced with positive affirmation for the beginning farmer.
- Entertain a wide variety of questions from the beginning farmer but will establish proprietary boundaries based on their comfort level to maintain their competitive advantage in the marketplace.
- Value teaching, learning and more farmers in the community and marketplace.
- Encourage networking and continuing education through appropriate resources.

Additional Mentors Attributes Needed for Internship

- Is OK with the inexperience, questions and mistakes of Interns yet realizes the value of their labor.
- Holds Interns to a performance standard appropriate to their knowledge and skills but not of the same standard as the Mentor.
- Is patient and keeps their cool in stressful situations and allows those to be teachable moments.

- Inspires through example and motivates work teams to accomplish tasks
- Allows time for communication regarding Intern performance.
- Delegates tasks appropriate to Intern skill level.
- Avoids exploitive use of Intern's effort by considering the educational components and mixing work with education.
- Has the desire to open farm/home to Interns, understands that an Internship is not just about the work in the field, but the lifestyle that comes with being a farmer.
- Works with Interns in the field to develop a partnership for farm success and sense of group effort.
- Has conversations with Intern to evaluate how the work and overall farm experience is going for the Intern.
- Is prepared for Interns to be dissatisfied with some experiences and willing to talk and work this out.

Mentor Expectations and Responsibilities for Mentorship

- 2 hours/month average (15 min/ week minimum) of contact time February through October via phone, email, and farm visits (1st farm visit in February/March).
- Listen to ideas and provide feedback.
- Provide insights into "behind the scenes" issues.
- Discuss big picture items and practical tasks as deemed appropriate by the Mentor.
- Engage Mentee with Learning Goals outlined in Professional Development Plan
- Offer resources, contacts, general advising on business structure, and tools to find answers.
- Provides brief bio of farm characteristics and farming skills for other Mentees.
- Complete mid-season and end of season evaluations as part of agreement to receive payment .

Mentor Expectations and Responsibilities for Internship

- Establish a clear work schedule with Intern for a minimum 20 hours per week of work, with start and end dates agreed upon at time of selection.
- Have an orientation and trial period for two weeks where Intern is acclimated to the culture, operating procedures, and safety requirements of the farm. At the end of the two weeks, either party may terminate Internship if there is not a good fit.

- Commit to explaining the specifics of each task and how these tasks fit into the bigger picture of sustainability at their farm.
- Provides brief bio of farm characteristics and farming skills for other Mentees.
- Engage Mentee with Learning Goals outlined in Professional Development Plan
- Complete mid-season and end of season evaluations.

Teaching Strategies for Internships²

- Understand the learning style of individual Interns: most people are a mix of visual, auditory, and kinesthetic/tactile and will learn best through some mix of one or two of those options. Experiential Learning will have a strong focus on kinesthetic by its nature. Lecture format (auditory) is not the best for other learning styles.
- Plan ahead for instruction however informal and have backup plans in case the particular tasks are not doable in the moment.
- Learner motivation is key to their learning. Help them understand *why* they want to learn particular skills and concepts.
- Invite learner questions as they will reinforce their motivation and deepen their understanding of the skill or concept.
- After motivation, show and/or explain to the Intern the proper way to do the task, allow them to perform the task, observe their performance, give them constructive feedback on their performance, and work with them through ongoing performances to further refine their skills.
- Have Intern join projects with other farm staff (more full time or experienced) to facilitate learning and build farm community.

This is a brief summary of a few key concepts discussed in depth in the book cited here and from local experiences in Colorado. Program Coordinators and Mentors are encouraged to learn more and share this with each other.

Learning Goals for the Mentee/Intern

- Mentees and Interns will create a professional development plan and will share this document with their Mentor and Building Farmers program Coordinator.
- If there are more detailed aspects of these topics that can be articulated as specific learning goals, these should be included in that same document.

² The On-Farm Mentor's Guide: Practical Approaches to Teaching on the Farm. New England Small Farm Institute. Miranda Smith. Belchertown, MA. 2006

- Core Experiential Learning goals for BFW include (*the learner will be able to:*)
 - Mentees understand how business planning and record keeping are used to make management decisions.
 - Interns explain in very basic terms why record keeping is an important tool for making management decisions.
 - Both Mentees and Interns should strive to achieve most of the following learning goals:
 - Understand pest management strategies
 - Understand soil fertility strategies (for cropping systems)
 - Understand production system scheduling to meet harvest goals
 - Understand post-harvest handling for food safety and product quality
 - Understand marketing strategies
 - Describe local community resources
 - Understand personal attributes of a successful farmer
 - Connect Experiential Learning with their business plan created or refined in the classroom phase of the Building Farmers program.
 - Explain how this experience has shaped their overall understanding of agriculture

Mentor Compensation

- Mentorship Mentors are paid \$500 for the season in monthly payments (\$25/hr x 20 hours, vegetable market farm season is Feb – Oct, but the period of mentoring can be agreed upon at time of Mentee selection).
- Work with BFW Leadership Team to determine the number of Mentorships financially possible in your area.

Intern Compensation

- Interns are paid \$4,000 less workers' compensation and other required employer deductions for the season in monthly payments (\$10/hr x 20 hours, over 18 weeks between April – Aug)
- These finances run through the farm, so Mentors can have local control of Intern. Mentors would receive funds to be passed to Intern on a monthly basis. In the event that the relationship is not working, Mentor will alert Coordinator and funds will no longer be transferred to Mentor.

- Mentors will be required to pay workers' compensation for Intern. For more information see the US Department of Labor's Office of Workers' Compensation website at: <http://www.dol.gov/owcp/>
- Work with BFW Leadership Team to determine the number of Internships financially possible in your area.

Mentor Pool

- Coordinators set up a Mentor Pool so Mentees can contact any Mentors actively serving as Mentors in their geographic area, even if she/he is not their primary Mentor.
- To set up the pool, the Coordinator asks each Mentor to put together a brief biography with specific skills/expertise. The Coordinator then compiles these bios and sends the list to all Mentees and Mentors. Mentees can then contact other Mentors when they have a question outside of their primary Mentors' fields of expertise.



Chapter 14: Planning for Experiential Learning

Application Process

Promotion

Applicants must have a certificate of completion from a Building Farmers Program, meaning they must have presented a business plan with sufficient detail and numbers, not just narrative. You can promote the Experiential Learning Program to your list of graduates as well as other graduates from other regions in Colorado though it is primarily intended for participants in your geographic region.

Mentee Expectations and Responsibilities

- 2 hours/month average (15 minutes/ week minimum) of contact time February thru October via phone, email, and farm visits (1st farm visit in February/March)
- Respect Mentor's busy schedule and find appropriate times for communication
- Draft and discuss Professional Development Plan with Mentor that includes 3 learning goals with realistic learning objectives for each goal
- Be prepared to do lots of homework, figuring, planning and leg work as a self-directed, independent learner to minimize the efforts and time for the Mentor
- Make use of this opportunity by engaging the program early and often – 15 minutes per week minimum

Intern Expectations and Responsibilities

- Establish a clear work schedule with Intern for minimum 20 hours per week of work, and specific start and end dates once the Mentor decides which elements of the operation the Intern will primarily contribute to (production planning, market development, harvest and distribution)
- Commit to the Six Ps: prompt, prepared, productive, polite, positive mental attitude, and participate
- Draft and discuss a Professional Development Plan with one learning goal
- Understand that there is an orientation and trial period for two weeks and at the end of the two weeks, either party may terminate Internship if there is not a good fit.

- Recognize that some of their payment is in the form of the knowledge shared by the Mentor and the experience of working closely in a successful farm business
- Follow all requirements of the Building Farmers Internship program
- Conform to any additional requirements determined by the Mentor

Application and Professional Development Plan

- Both Internship and Mentorship applications require the applicant to complete a Professional Development Plan. This Plan is intended to help Intern/Mentee identify and focus their personal learning. The Plan then guides and informs the Mentor matching process and helps the Mentor better provide a learning experience tailored to needs/interests of the Intern/Mentee.
- Example applications can be found in *Dropbox, Chapter 14*.

Application Timeline

- November – Recruit Mentors for Experiential Learning program
- December - Advertise Experiential Learning program
- January - Applications due
- January - Advisory Committee reviews applications and matches Mentors with Interns/Mentees
- January/February – Mentorships Start (Mentors plan first site visit)
- March/April - Internships Start
- Internships will have a two-week trial period to ensure it is a good match for both Mentor and Intern. If either chooses to terminate the match, the local Coordinator will work to find another Mentor.
- For a more detailed timeline see *Chapter 14, Experiential Learning Timeline*

Application Fee

- Currently, Mentees pay \$90 and Interns pay \$50. These funds pay for a kick-off meal or refreshments and to generate some cost recovery for the Coordinator.
- Traditionally, the end of season meal is paid for by each Mentor, Mentee and Intern that attends.

Application Review

- Review applications with potential Mentors. Mentors should decide which applicant they would prefer to work with.
- The Mentor and Mentee/Intern should be geographically close enough for farm visits; however, ideally they should be pursuing different markets so that Mentor and Mentee/Intern are not likely to be direct competitors.
- As with the applications for the “Principles” course, we recommend using the application scoring rubric and determining a minimum cut-off score for successful applicants to avoid any potential bias in selection.
- Also, any meals provided for the application review meeting need to be purchased through local accounts as they are not covered by the grant.

Self Assessments for Accepted Mentees and Interns

- Coordinators should mail accepted Interns and Mentees the Self-Assessment Tools and Scoring Rubrics. Mentees and Interns will be asked to return these to the Coordinator who will then review and pass them on to their appropriate Mentor. We hope these will be used as a valuable teaching tool, guiding conversations throughout the Internship/Mentorship.



Chapter 14: Planning for Experiential Learning

Coordinators Role in Internship/Mentorship

In addition to recruiting the Mentors and facilitating the application process, Coordinators are responsible for the following:

Kick-off Dinner

Coordinators should arrange for a kick-off dinner or lunch in February/March or earlier for all Mentees, Interns and Mentors. Registration fees should be used to pay for the dinner.

Periodic Check Ins

Coordinator should check in with both Mentor and the Mentee/Intern at least 2-3 times during the summer. We recommend that you contact Mentors and Interns/Mentees separately by phone or email to check in (how's it going, are you getting paid, is this what you had hoped for/expected?).

Farm Tours

Coordinator should also arrange for tours at Mentor and Mentee farms during May-August (depending on timing of peak production in your geographical region). The farm tours are open to active participants in Experiential Learning and offer a great opportunity for on-site sharing of best practices.

(Optional) Mid year evaluation

Coordinators may develop an additional online or paper-based evaluation to answer any locally-specific questions.

End of Season Dinner and Post-evaluation

Coordinator should arrange for an End of Season dinner or lunch in December with all of the Mentors, Mentees and Interns. During the dinner, all participants are asked to complete a paper evaluation of how the Experiential Learning has changed their knowledge and planned future actions. Typically, everyone pays for his or her own meal at the End of Season lunch or dinner.



Chapter 14: Planning for Experiential Learning Resources

The following resources can be found in the Chapter 14 Folder on Dropbox

- 1) Example Mentorship Application
- 2) Example Mentorship Professional Development Plan
- 3) Example Tri-Fold Mentorship Brochure
- 4) Example Mentorship Application Scoring Rubric
- 5) Example Internship Application
- 6) Example Internship Professional Development Plan
- 7) Example Tri-Fold Internship Brochure
- 8) Example Internship Application Scoring Rubric
- 9) End of Season Evaluation for Intern, Mentee, Mentor

The following resources can be found in the Chapter 10 Folder on Dropbox

- 1) (Do Not Email) Self Assessment: Crops
- 2) (Do Not Email) Self Assessment: Livestock
- 3) (Do Not Email) Self Assessment: Personal, Business Management and Marketing Capabilities
- 4) (Do Not Email) Scoring Grid: Crops
- 5) (Do Not Email) Scoring Grid: Livestock
- 6) (Do Not Email) Scoring Grid: Personal, Business Management and Marketing Capabilities
- 7) Charting Your Path



Building Capacity

Building Community

Colorado
State
University

Extension

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