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BUILDING FARMERS IN THE WEST: CREATING NEW CAPACITY, COMMUNITY AND OPPORTUNITIES FOR SPECIALTY PRODUCERS

NON-TECHNICAL SUMMARY: Growing demand for local, fresh foods has created new market opportunities for Western producers and has highlighted the information and experience gaps that limit entry and successful competition for new and transitioning small-farm producers. Agricultural production possibilities vary greatly throughout the West due to topography and climate and access to consumers and marketing infrastructure as do opportunities and risks resulting from: a) changing production modes, b) engaging in direct marketing, and c) changing business planning to capture new markets. The project team, drawn from 6 states with a mix of community based organization and university personnel, will equip 550 producers with the improved knowledge, planning skills, and directed technical assistance necessary to compete in specialty produce and livestock markets. Beginning farmers participating in this project will learn to build and maintain economically viable operations based on the knowledge, skills, tools, and experience developed through the cooperation and education from community food organizations including Farm to Table, Rocky Mountain Farmers Union, the Northern Colorado Food Incubator, state-based Farm Bureau and Healthy Community Food Systems, successful growers, and Land Grant Universities in Washington, Colorado, Nevada, Idaho, New Mexico and Oregon. The project scope focuses on four activities supporting local food system-oriented producers: 1) identifying, developing and refining essential curriculum, 2) delivering this curriculum to producers or partner educators, 3) innovating experiential learning strategies to complement classroom lessons, and 4) evaluating program materials and delivery methods. Structured classroom training will build capacity among producers on core topics in business planning, accounting, regional direct marketing strategies, and business development, which is reinforced through interactions with University collaborators, producer peers, and input providers and community resources. The program will link producers with direct marketing outlets to strengthen local agriculture and food systems in several ways. Sixteen program delivery sites will offer classes to approximately 550 participants. In some regions, course graduates will apply for field-based producer mentorships or other experiential learning to advance their business goals. Mentorships allow participants to gain on-demand access to an experienced, successful farmer or pool of farmers to answer questions related to business planning, production and marketing issues, as they arise throughout the season. This project fosters development of a comprehensive new farmer education tool kit for the Western United States, building on existing materials from various USDA, University and Organizational programs, drawing on the strengths of individual partner states and collaborators' knowledge of local and regional production and marketing conditions, and relying on the collaborating institutions' ability to provide long-term technical assistance.

OBJECTIVES: The goal of the six-state Building Farmers program is to train producers in Colorado, Idaho, Oregon, New Mexico, Nevada and Washington to successfully enter and compete in emerging markets by providing a classroom and experiential learning program that improves knowledge and skills in several areas including: farm business planning, strategic planning, combined with specific tools such as recordkeeping, financial management and understanding the legal

and regulatory environment governing direct markets for various products, business succession planning); expanding farmer networks in local farm communities; food safety approaches appropriate for direct marketing; organic production issues and marketing opportunities; production certification choices, benefits, costs, and marketing opportunities; and exploring feasibility of value added product enterprises. Objectives: 1: Identify, refine and develop curriculum modules and decision tools that are well-suited to the educational needs of the target audience, build capacity for strategic business planning among producer participants, and use existing resources from governmental, NGO and University sources. Completed in 2009-2010. 2a: Deliver customized business planning programs targeted to the needs of 350 producers in 5 states and 12 sites (to augment 200 producers in 5 regions of Colorado already planned). A complementary train-the-trainer model will be developed for those regions and institutions that are able to offer this level of instruction (Cultivating Success in the Northwest and FFA instructors in Colorado). Completed in 2010-2011. 2b: Organize and coordinate experiential learning programs for all sites in Colorado and at least 3 other sites. Participants who complete the classroom program will qualify to apply for mentoring from experienced producers, or a cost-shared intern to work at the farmer producer's operation or with a production oriented community organization. 3: Evaluate curriculum, program learning objectives, evaluation instruments used for the classroom and experiential learning programs and post-program producer outcomes assessment. Begins in 2010 and extends through 2012. Outputs: 1. Building Farmers training programs in 16 areas across 6 states that address local input availability and constraints as well as local marketing opportunities, directly engaging 550 producers; 2. Mentorship programs in many areas to provide hands on training for the programs classroom producer participant; 3. An experiential learning pilot program in Boulder County, CO to extend farmer knowledge & resources which can then be replicated in 3 other sites outside of Colorado; 4. The Building Farmers curricula available in different electronic & print formats to increase accessibility, and in Spanish, Hmong and other languages where demand is documented; and 5. Curriculum modules around core topics that comprise a complete instructional methodology for beginning farmers and ranchers across the Western US.

APPROACH: A sustained educational framework to support new and transitioning producers is achieved through structured but interactive classroom sessions, followed by guided mentoring in targeted locations that enables classroom participants to apply their knowledge gained to their own farm or ranch enterprises. Experiential learning programs offering on farm or ranch work experience will teach producers how to find and effectively allocate different community labor resources including unpaid volunteers, interns, and paid workers for critical transplanting, weeding and harvesting tasks. The interactive nature of these courses responds to the varying needs of new and transitioning producers, as newer producers gain knowledge from contact time with more experienced producers, and more experienced producers graduate to mentoring positions where they are able to enhance their knowledge of non-traditional cropping patterns, labor management, input utilization and marketing outlets in their region while being compensated for the educational roles they play. Although there are many valuable materials available, we believe it is essential to: 1) identify the most relevant curriculum pieces; 2) test and refine these materials in conjunction with producers; and 3) develop missing elements in order to provide a sustainable business development foundation that can be completed in a short planning horizon but will be sufficiently detailed to help small farmers and ranchers enter emerging markets throughout the West. The multi-state, collaborative basis for this project provides several advantages that improve current state- and local-level programming for beginning farmers and ranchers, including: developing new curricula based on best practices in many states (i.e., adapting production and revenue planning decision tools to intensive intercropping, CSA share-based production, or non-acreage based enterprises), engaging new farmer populations for which partner states previously had limited or no resources, and testing new program delivery methods across a diverse producer population (i.e., experiential learning or developing alternative educational formats using Web-based curricula and on-line communities). The assessment team will draw on producer advisory boards, where they are established, peer reviews among the University and organizational partners and current agricultural education literature to evaluate the curriculum and learning materials. In evaluating the participants' learning experiences, we will consider the types of evaluation instruments, timing of each

ype of evaluation, use of focus groups and inclusion of community partners in evaluating the participant business plans and other outputs. At the end of the project, we hope to use an extensive evaluation to fine-tune programs while they are still being developed and taught in the region so that we can also assess if changes/improvements result in better outcomes for the program participants.

IMPACT: 2009/09 TO 2012/08

Classroom instruction was delivered to 261 beginning farmer/ranchers in years 2 and 3 of the Building Farmers in the West program with 19 workshops conducted in 7 states. Five states also provided an experiential learning component for 25 mentees and interns. Information that substantiates participant outcomes was done using a 3-tier assessment program. In the first year of classroom instruction 49 or 48% of the 102 beginning producers who participated completed a viable business plan for their operations. In year 2, 110 or 69% of the 159 attendees completed a viable business plan. Producer participants presented their plans at the end of the short course series, receiving critical feedback from an attending panel of experts that included advisory board members. All participants experienced increased knowledge of the risks and opportunities associated with the direct and targeted wholesale marketing of output from their operations and developed mission statements and goals that would help guide the development of their operation. The percentage change between pre and post workshop evaluation attitude type statements were high in the following 3 areas for both years of classroom instruction: "I Follow a Financial Plan for My Operation Annually" (91 participants or 89% Yr1, 110 participants or 69% Yr2), "I Follow a Marketing Plan for My Operation Annually" (87 participants or 85% Yr1, 92 participants or 58% Yr2), "I Currently Have a Business Plan for My Operation" (80 participants or 78% Yr1, 78 participants or 49% Yr2). Between the pre and post course evaluations in both years participants showed the most improvement in the knowledge of accessing local resources/technical support; (62 participants or 61% Yr1, 95 participants or 60% Yr2). Minor improvements were made in maintaining financial records and budgets in both years (25% and 17% respectively); it was noted through participants' feedback that this is a topic that was the most cumbersome for them. Assessment responses overwhelmingly indicated that attending the Building Farmers in the West workshops improved their quality of life, helped them achieve their goals, and also helped to improve their farming community. The workshops also provided the majority of participants with a network of farmers to work with (79% Yr1, and 83% Yr2). Classroom participants also had the option of pursuing additional experiential learning opportunities in the form of a mentorship or unpaid internship. Twenty-three participants enrolled in mentorship programs in 6 states with 2 internships in 1 state. Qualitative evaluations indicated that on the whole, mentees were pleased to have access to higher level learning and mentors considered it a good learning experience. In some cases, mentees were not yet ready for a mentorship. The findings indicated that there is great value in an experiential learning program. The complete Program Evaluation Report can be accessed on the BFW website:

<http://buildingfarmersinthewest.org/evaluations.html>

PUBLICATIONS (not previously reported): 2009/09 TO 2012/08

. McFadden, Dawn Thilmany & Suresh Sureswaran Innovations to Support Beginning Farmers and Ranchers. Choices, vol 26, no. 1 First Quarter 2011

. Meyer, Lee, Jennifer Hunter, Ani Katchova, Sarah Lovett, Dawn Thilmany, Martha Sullins, & Adrian Card. Approaching Beginning Farmers as a New Stakeholder for Extension. Choices, vol. 26, no. 1 First Quarter 2011

PROGRESS: 2011/09/01 TO 2012/08/31

OUTPUTS: The Building Farmers in the West (BFW) program targeted and built business planning capacity for over 261 beginning farmer and rancher participants, as well as 225 community Advisory Board members and speakers throughout the 7 state area (total of 486 participants). Over the course of 3 years, 4 primary activities supported local food system-oriented producers, including 1) identifying, developing and refining essential curriculum in the 3 core topic areas of strategic business planning, marketing and record keeping and financial analysis; in addition to elective topics (food safety, income taxes, land acquisition and agritourism) appropriate to the needs of the target audiences, 2) delivering this curriculum to program participants through an 8 week or intensive short course, 3) utilizing experiential learning to

omplement classroom lessons and 4) conducting a 3-tiered assessment program including a pre, post and follow-up valuation for the purpose of measuring participant changes in knowledge/skills, attitudes, practices, and economic and social conditions. In year 1, a core curriculum consisting of Power Point presentations, fact sheets, worksheets and other educational resource materials, was developed and compiled by the 7 state BFW leadership team and peer reviewed by extension farm management and marketing specialists from across the country. Core topics with their associated curriculum modules were implemented in classroom sessions for new farmers in 7 states in years 2 and 3. Advisory boards established in the first year in each of the participating states, contributed throughout the life of the project to the curriculum evaluation process; in particular to assess the applicability for different learning styles and appropriateness for local audiences needs. Advisory Board members also recommended elective topics, speakers, and helped to recruit workshop participants. In the first year the BFW evaluation committee developed evaluation tools for classroom and experiential learning phases of the project. In years 2 and 3 pre and post course, and follow-up evaluations were conducted for the purpose of measuring changes beginning farmers and ranchers made as a result of attending these courses and for evaluating the effectiveness of the course content. The 7 state partner organizations participated in annual meetings and quarterly conference calls for the purpose of refining delivery methodology, evaluating course materials, adapting curriculum modules to meet specific regional needs and manage outcome assessments for participants at specific points during the project as stated above. A website (<http://buildingfarmersinthewest.org>) dedicated to the BFW project was implemented in year 2; containing the core curriculum and electives along with supporting educational materials, evaluation forms and outcome assessment reports, state workshop announcements and course schedules and other information relevant to successful BFW program delivery. Experiential learning occurred in six states providing hands on training for 23 producer mentees and 2 interns - all of whom had completed the classroom course. PARTICIPANTS: Participating team members, including extension faculty from seven states and CBO collaborators, worked together across state lines to teach an effective multi-state curriculum to achieve program goals and objectives during the last 2 years of this program. In all states advisory committees, which included bankers, experienced local farmers, chefs and a wide range of others involved in direct marketing and/or smaller scale agriculture, provided input on curriculum relevance and advised participants on their business plans; serving overall to build community capacity for the program and success for new and beginning farmer/rancher participants. As stated in the Output section, all multi-state curriculums shared three core topics with additional electives, but in each state programming was tailored to the needs of local farming and ranching. Each workshop series was delivered using a team teaching approach. Teams generally consisted of an extension farm management or marketing specialist working in tandem with a highly accomplished, innovative farmer or rancher or chef or food processor known for using local products. Co-teacher participants were instrumental in helping producers understand and manage the risks inherent in businesses selling directly to consumers. Over 250 dedicated advisory board members and speakers provided technical assistance and helped to eliminate or reduce barriers to entry into new markets encouraging the implementation of producers' business plans that would help them achieve their stated production and marketing goals. Bart Eleveld and Kent Fleming (Oregon Extension Farm Management Specialists) presented 2 workshop series for 23 beginning farmers, using the multi-state curriculum modified for Oregon. Wilson Gray (Idaho Extension Farm Management Specialist) held a workshop series for 22 participants. Mykel Taylor (Washington Extension Farm Management Specialist) provided "train-the-trainer" programming for the "Cultivating Success" project for Washington State University's Small Farm Program (19 participants). Adrian Card, Dawn Thilmany, Martha Sullins and Blake Angelo from Colorado State University Extension organized and helped teach the Colorado workshops (124 participants). Leedams (Farm-to-Table Co-Director) organized and helped teach the 2 New Mexico workshop series (24 participants). Kyndal Curtis (Utah State Extension Marketing Specialist) organized and helped teach workshops in Utah and Nevada (50 participants) that included socially disadvantaged participants (Native Americans from 4 reservations in Nevada attended the workshop series). Dr. Curtis also oversaw the program's evaluation process with help from Martha Sullins, Kellie Enns and Jo Ann Warner. Mykel Taylor, Dawn Thilmany and programmers from Washington and Colorado developed a version

f a farm and garden calculator for use as a retail sales calculator and/or budget tool in conjunction with each state's enterprise budgets. TARGET AUDIENCES: The target audience for the Building Farmers in the West Program were new farmers and "beginning farmers" (those who have been farming less than 10 years) who needed help in strategic business planning, direct marketing, recordkeeping & financial analysis, and writing a business plan. Workshops were designed for and delivered to this target audience in Colorado, New Mexico, Nevada (Tribal audience), Idaho, Oregon, Utah, and Washington. These workshops (each a series of 8 3-hour classes which included a working dinner) were organized to allow these beginning farmers to work and learn together in small group sessions and to interact one-on-one with educators and established farmers who have considerable experience with the topic(s) being considered. Of the 261 total farmer participants, the majority were either new farmers/ranchers (less than one year experience) or intermediate farmers/ranchers (less than three years experience). There were relatively less experienced farmers/ranchers (more than three years experience). Beginning producers' success is evidenced through feedback received from them after completing the BFW workshop series: an Oregon participant whose employer taught one of the classes discovered that the student was interested in expanding his business skills (sheep ranch) and stepped in as his mentor; an Idaho participant did a mentorship with a local operation whose owner served as one of the Advisory Board members; 2 Boulder County graduates from Colorado applied for and were awarded Rural Development Value Added Grants over \$25,000 based on the success of the business plans they developed as part of the BFW program and upon completion of the Colorado workshops 50% or 114 participants reported that their farms were more economically viable.; a New Mexico participant played that the long term planning component was the most valuable part of the course and as a result, their operation changed their marketing model from selling at a farmers market to selling through a broker; a Utah participant built a fully inspected poultry processing facility on his farm as a result of attending the workshops; and in Nevada two Native American mentees intern and 8 additional Native American producers benefitted from both classroom and field instruction over the course of a 5 day mentoring program. Evaluations confirmed the value to participants of networking, both with other beginning farmers and with highly experienced farmers. Evaluations also confirmed the effectiveness of one-on-one training to bring about significant changes in business management practices. The success of the Building Farmers in the West program is demonstrated by the changes that beginning farmer/ranchers made as a result of participating. Attending the workshops improved their ability to better understand the big picture and assess the steps involved in realizing their goals. This program succeeded in expanding the knowledge base of its participants, particularly in the areas of marketing and business plan development and over half of the participants reported that their farm operations were more economically viable and efficient 6-9 months after course completion. PROJECT MODIFICATIONS: Nothing significant to report during this reporting period.

IMPACT: 2011/09/01 TO 2012/08/31

Classroom instruction was delivered to 261 beginning farmer/ranchers in years 2 and 3 of the Building Farmers in the West program with 19 workshops conducted in 7 states. Five states also provided an experiential learning component for 25 mentees and interns. Information that substantiates participant outcomes was done using a 3-tier assessment program. In the first year of classroom instruction 49 or 48% of the 102 beginning producers who participated completed a viable business plan for their operations. In year 2, 110 or 69% of the 159 attendees completed a viable business plan. Producer participants presented their plans at the end of the short course series, receiving critical feedback from an attending panel of experts that included advisory board members. All participants experienced increased knowledge of the risks and opportunities associated with the direct and targeted wholesale marketing of output from their operations and developed mission statements and goals that would help guide the development of their operation. The percentage change between pre and post workshop evaluation attitude type statements were high in the following 3 areas for both years of classroom instruction: "I Follow a Financial Plan for My Operation Annually" (91 participants or 89% Yr1, 110 participants or 69% Yr2), "I Follow a Marketing Plan for My Operation Annually" (87 participants or 85% Yr1, 92 participants or 58% Yr2), "I Currently have a Business Plan for My Operation" (80 participants or 78% Yr1, 78 participants or 49% Yr2). Between the pre and post

course evaluations in both years participants showed the most improvement in the knowledge of accessing local resources/technical support; (62 participants or 61% Yr1, 95 participants or 60% Yr2). Minor improvements were made in maintaining financial records and budgets in both years (25% and 17% respectively); it was noted through participants' feedback that this is a topic that was the most cumbersome for them. Assessment responses overwhelmingly indicated that attending the Building Farmers in the West workshops improved their quality of life, helped them achieve their goals, and also helped to improve their farming community. The workshops also provided the majority of participants with a network of farmers to work with (79% Yr1, and 83% Yr2). Classroom participants also had the option of pursuing additional experiential learning opportunities in the form of a mentorship or unpaid internship. Twenty-three participants enrolled in mentorship programs in 6 states with 2 internships in 1 state. Qualitative evaluations indicated that on the whole, mentees were pleased to have access to higher level learning and mentors considered it a good learning experience. In some cases, mentees were not yet ready for a mentorship. The findings indicated that there is great value in an experiential learning program. The complete Program Evaluation Report can be accessed on the BFW website:

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PUBLICATIONS: 2011/09/01 TO 2012/08/31

. McFadden, Dawn Thilmany & Suresh Sureshwaran Innovations to Support Beginning Farmers and Ranchers. Choices, vol 6, no. 1 First Quarter 2011

. Meyer, Lee, Jennifer Hunter, Ani Katchova, Sarah Lovett, Dawn Thilmany, Martha Sullins, & Adrian Card. Approaching Beginning Farmers as a New Stakeholder for Extension. Choices, vol. 26, no. 1 First Quarter 2011

PROGRESS: 2010/09/01 TO 2011/08/31

OUTPUTS: The "Building Farmers in the West" [BFW] project team (team leaders from a six state consortium) implemented the teaching plan to deliver the BFW multi-state farm business-planning curriculum with workshops (each a series of eight 2-hour classes) in every state for over 100 farmer participants in total. The peer review of this multi-state, three-fold curriculum (strategic planning, marketing and finance), development of which had commenced during the project's first year, was completed, and the reviewer feedback was incorporated into all of the teaching materials. (This curriculum is based on a national survey and literature review that is available upon request.) Each curriculum team finished selecting and in some cases editing) appropriate recommended publications for use in varying degrees by workshop participants. The BFW evaluation committee completed the multi-state evaluation system to evaluate the effectiveness of the project curriculum and to measure participant outcomes. The evaluations are designed to show how well each of the course components worked and where and how they might be improved for the next series of workshops. All of the 2010-11 workshops were evaluated using the pre- and post-course evaluation instruments. (These evaluation instruments and results are available upon request.) The BFW state advisory boards, established during the first year, continued to provide course feedback and direction to each state's project team and state coordinators. Advisory board members also made practical suggestions about curriculum content, recommended farmer speakers and helped to select workshop participants from the pool of applicants. Additional content was included on the BFW project website (initiated during the first year) <http://buildingfarmersinthewest.org/index.html> The BFW project's web presence provides information to the public about the BFW project and has proven to be especially useful for informing potential farmer/rancher participants about the particular workshops being offered. All state teams spent the summer quarter revising curricula based on the course evaluations, incorporating advisory board input and otherwise improving the content and delivery methods for the workshops to be offered during the project's final year. The effort to recruit the most appropriate new participants is ongoing. Software development of the BFW decision-aid tool continued and a beta version was used in the Colorado and Utah workshops. This web calculator tool is designed to improve strategic planning by optimizing use of available production space (e.g., greenhouses and market gardens) to improve marketable yields on smaller-scale farms. Effective use of this tool will help participants to improve farm profitability. Two peer reviewed journal articles were published in Choices. (Listed below.) **PARTICIPANTS:** Participating team members, including extension faculty from six states and CBO

collaborators, worked together across state lines to teach an effective multi-state curriculum to achieve program goals and objectives. In all states advisory committees, which include bankers, experienced local farmers, chefs and a wide range of others involved in direct marketing and/or smaller scale agriculture, assured/provided input on curriculum relevance and advised participants on their business plans; serving overall to build community capacity for the program and success for new and beginning farmer/rancher participants. (All multi-state curriculums share a common three-fold core with additional electives but in each state programming is tailored to local farming and ranching conditions.) Each workshop series is delivered using a team teaching approach. The team usually consists of an extension farm management or marketing specialist working in tandem with a highly accomplished, innovative farmer or rancher or chef or food processor known for using local products. These co-teacher participants are not all listed here for each workshop, but the Oregon experience is typical: Bart Eleveld and Kent Fleming (Oregon Extension Farm Management Specialists) presented a workshop series for 14 beginning farmers, using the multi-state curriculum modified for Oregon. The strategic planning component was taught together with a sheep producer recognized for his innovative business organization and marketing skills. The financial analysis component was taught with an agricultural banker. Larry Lev (OSU Marketing Specialist) taught the marketing module with a farmer who is an exemplary CSA farmer. The value-added elective was taught with a farmer who successfully runs a vertically integrated grain farming operation that includes everything from production to distribution, including a grain mill that produces a wide range of products. Wilson Gray (Idaho Extension Farm Management Specialist) held a workshop series for 22 participants. Mykel Taylor (Washington Extension Farm Management Specialist) provided "train-the-trainer" programming for the "Cultivating Success" project, Washington's small farm program (19 participants). Adrian Card (Colorado State Extension Agent) organized and helped teach the Colorado workshop (8 participants). Dawn Thilmany (Colorado Extension Marketing Specialist) taught the marketing component. Le Adams (Farm-to-Table Co-Director) organized and helped to teach a New Mexico workshop series (15 participants). Kynda Curtis (Utah Extension Marketing Specialist) delivered a Utah workshop (24 participants) and taught the marketing component. She also organized a Nevada workshop (10 participants) and oversaw the program's evaluation process. Martha Sullins (Colorado State Research Associate) guided the implementation of the course and participant evaluation process that she helped devise. Programmers in Washington and Colorado continued development of a web calculator tool that optimizes the use of production space to improve small farm profitability. **TARGET AUDIENCES:** The target audience is new farmers and "beginning farmers" (those who have been farming less than 10 years) who need help with strategic business planning, direct marketing, recordkeeping & financial analysis, and writing a business plan. Workshops were designed for and delivered to this target audience in Colorado, New Mexico, Nevada (Tribal audience), Idaho, Oregon, and Washington. These workshops (each a series of 8 3-hour classes which included a working dinner) were organized to allow these beginning farmers to work and learn together in small group sessions and to interact one-on-one with educators and established farmers who have considerable experience with the topic(s) being considered. Of the 102 total farmer participants, the majority were either new farmers/ranchers (less than one year experience) or intermediate farmers/ranchers (less than three years experience). Only 13% were relatively experienced farmers/ranchers (more than three years experience). Evaluations confirmed the value to participants of networking, both with other beginning farmers and with highly experienced farmers. Evaluations also confirmed the effectiveness of one-on-one training to bring about significant changes in business management practice. These observed changes appear, at least in part, to derive from the programmatic focus on a particular target audience and provision for intensive one-on-one work over an extended time period. **PROJECT MODIFICATIONS:** Nothing significant to report during this reporting period.

IMPACT: 2010/09/01 TO 2011/08/31

The second year focus of the 3-year BFW program was presenting workshops in every state, evaluating the effectiveness of his teaching effort, and modifying the curriculum and/or teaching methods for third year workshops. All workshops are designed primarily to bring about meaningful changes in the abilities of individual beginning farmers to carry out effective strategic business planning and to prepare a farm business plan. An 8-week process, involving the identification of business

and farm family values, goals and objectives and the development of marketing and management strategies that will enable the farming operation to achieve its goals, culminates in the final class with participants presenting their business plans. The comprehensive evaluation of the workshops clearly demonstrates that overall this objective was achieved, although some areas were identified in which improvements were possible. 60% of participants reported improvement in accessing local resources/technical support, developing business plans, and using effective merchandising at direct markets. The least improvement was seen in maintaining financial records & budgeting. Some participants set up recordkeeping systems, that while simple to use, were adequate for measuring financial performance and progress toward realizing their strategic goals. However, keeping good records, essential for planning and monitoring the implementation of strategic business plans, was challenging for many. Future workshops will need to devote more time for hands-on work in order to develop this critical skill. In pre-course and post-course assessments all participants were asked to rate their business planning knowledge/skills. Attendees were asked before and after the workshop if they knew where to obtain various products and services for their operation. The most improvement was seen in business management support, marketing strategy advice, and capital/credit providers. Marketing and management practices and attitudes changed significantly. A major improvement was observed in participant attitudes about the need for business plans and understanding of the business planning process. (These were given the highest ratings in the post-course assessment at 4.56 and 4.54 out of 5.0 respectively.) All participants started a business plan and half actually completed a viable business plan during the workshop. Additionally, 88% of the participants felt they could use at least 80% of the workshop material. Through these workshops most participants reported having developed an effective network of farmers to work with in the future, reflecting the positive social impact of the program. A good measure of overall success is the fact that 90% of the participants would recommend this course to other farmers/ranchers. Nine-month follow-up evaluations will be completed next year.

PUBLICATIONS: 2010/09/01 TO 2011/08/31

McFadden, Dawn Thilmany & Suresh Sureshwaran. Innovations to Support Beginning Farmers and Ranchers. Choices, vol. 26, no. 1 (First Quarter 2011)

Meyer, Lee, Jennifer Hunter, Ani Katchova, Sarah Lovett, Dawn Thilmany, Martha Sullins, & Adrian Card. Approaching Beginning Farmers as a New Stakeholder for Extension. Choices, vol. 26, no. 1 (First Quarter 2011)

PROGRESS: 2009/09/01 TO 2010/08/31

OUTPUTS: The "Building Farmers in the West" [BFW] project team (team leaders from a six state consortium) created a multi-state farm business planning teaching curriculum in the first year of the three year BFW project. Because the foundation curriculum is critical to the success of this program, the team conducted a national survey of Extension faculty on farm management and marketing, other educators and farmers to determine what were regarded to be the most useful publications, software and courses related to strategic farm and ranch business planning, direct marketing and financial analysis. The recommendations were categorized into one of the four goal domains and prioritized (the survey and analysis are available upon request). Prior to an external review, an internal review was completed by team members who had not been involved in the initial development of the three core curricula (strategic planning, marketing and finance). The completed curriculum was then critiqued by external peer reviewers who possessed expertise in each of the identified subject areas. A peer review form was developed for external reviewers which helped to focus the review process. The majority of the peer reviews were completed in time for the start of the BFW workshops beginning in late October and early November. Additionally, teaching resources were reviewed and evaluated by BFW team members with particular knowledge in each subject area. Each curriculum team selected (and in some cases edited) appropriate recommended publications for use in varying degrees to workshop participants. The BFW project evaluation committee developed a multi-state evaluation process to evaluate the effectiveness of the curriculum and to measure participant outcomes. A central online collection system will house all of the workshop evaluations. The evaluations are designed to show how well each of the 4 course components worked and where and how they can be improved for workshops being offered during

the final year of the program. Both pre and post course evaluations will be conducted as well as a follow-up evaluation that will be distributed to workshop participants 9 and 18 months after course completion. Additionally, an evaluation procedures guide was prepared for workshop organizers. BFW Advisory Boards were established for each workshop location in all participating states to provide direction to the each state's project team and state coordinators, to make suggestions about curriculum content and farmer speakers, and to help select workshop participants from the pool of applicants. A standard application form was modified to accommodate the target audience in each state. A BFW project website was created to provide information to the public about the project and especially to inform beginning farmers and ranches about workshops being offered: <http://buildingfarmersinthewest.org/index.html>. BFW workshop preparations have been finalized: farmer-speakers recruited, site arrangements made, workshops publicized, and over 150 participants registered for classes being conducted this fall (a series of eight 3 hour classes. PARTICIPANTS: Participating team member including extension faculty from six states and CBO collaborators worked together across state lines to develop an effective curriculum to achieve program goals and objectives: Wilson Gray (Idaho Extension Farm Management Specialist) organized workshop series for Idaho, provided input during curriculum development and adapted the multi-state curriculum for Idaho producers. Mykel Taylor (Washington Extension Farm Management Specialist) helped develop the Financial Analysis curriculum and adapt the multi-state curriculum for Washington farming conditions, and is providing "train-the-trainer" programming for the "Cultivating Success" project, Washington's small farm program. Dawn Thilmany (Colorado Extension Marketing Specialist) and Martha Sullins (Colorado State Research Associate) conducted a national survey to identify recommended existing farm business planning educational material. They helped develop multi-state marketing and strategic planning curricula and adapt the whole multi-state curriculum to Colorado conditions. Sullins helped create course and participant evaluation instruments. Adrian Card (Colorado State Extension Agent) organized workshops for Colorado. Since the "Building Farmers in the West" project is modeled after the work Card has been doing in Colorado, he served as a valuable "informant" about what works and what does not work in a relatively long business planning workshop series. Le Adams (Farm-to-Table Co-Director) adapted the multi-state curriculum for New Mexico conditions and organized a New Mexico workshop series. Kynda Curtis (Utah Extension Marketing Specialist) organized workshops for Utah and Nevada, helped develop multi-state marketing curriculum and adapted the whole curriculum for Utah farming and ranching conditions. She also designed the evaluation process (as noted above in the "Outputs" section). Bart Eleveld and Kent Fleming (Oregon Extension Farm Management Specialists) adapted the multi-state curriculum for Oregon farming and ranching conditions and organized an Oregon workshop series. Fleming contributed to the financial analysis and strategic planning modules of the curriculum. Other participants included professionals who responded to the survey and provided recommended teaching materials, external peer reviewers, including Larry Lev (OSU), Brent Warner (British Columbia), Jeff Hyde (Penn State), Marisa Bunning (CSU), Jeff Kronenberg (Idaho) and Trent Teegerstrom (Arizona), local farmers, chefs and a wide range of others involved in direct marketing and/or smaller scale agriculture, who are serving on state advisory committees and programmer Doug Young (Washington) who is developing a computer model to optimize use of available production space (e.g., greenhouses and market gardens) to improve profitability of smaller-scale farms. TARGET AUDIENCES: The target audience is new farmers and "beginning farmers" (those who have been farming less than 10 years) who need help in strategic business planning, direct marketing, recordkeeping & financial analysis, and writing a business plan. Workshops are scheduled in Colorado, New Mexico (in progress), Nevada (in progress - Tribal audience), Idaho, Oregon, and Washington. Farmers registered for the workshops (a series of 8 3-hour classes) will work in small group sessions and one-on-one with educators and established farmers who have considerable experience with the topic(s) being considered. PROJECT MODIFICATIONS: Nothing significant to report during this reporting period.

IMPACT: 2009/09/01 TO 2010/08/31

Curriculum development and workshop planning was the main focus for the first year of the three-year BFW program. The workshop curriculum has three core components. Participants will take all three core classes and two electives. (There are five electives from which to choose.) All course work is aimed toward helping each participant prepare a business plan.

business plans will be presented during the last meeting of the eight-class workshop series. 1. "Strategic Business Planning" is based on a full appreciation of the critical importance of business planning. Participants move on to actively identifying business and farm family values, goals and objectives and devising a strategy that will enable the farming operation to achieve its goals. The strategy will only be realized successfully with effective implementation and monitoring of the plan. 2. "Direct Marketing" is taking direct responsibility for the marketing one's farm production rather than simply "dumping" into wholesale marketing channels. It requires one to develop a marketing strategy based on an accurate assessment of one's marketing strengths, weaknesses, threats and opportunities. a. Value-added elective: participants learn how to increase the profitability of products by processing them to some degree beyond the wholesale commodity level. b. Food safety elective: participants learn how to assure that the farm products marketed directly are safe for consumption by the consumer. c. Agritourism elective: participants learn how to market farm products by providing consumers with a farm experience. 3. "Recordkeeping & Financial Analysis" are essential for monitoring the implementation of the farm business strategy. Participants set up a recordkeeping system that is simple to use but adequate for management purposes. With good records available one can calculate meaningful measures of financial performance that will clearly demonstrate the progress toward realizing one's strategic goals. a. Income tax elective: using the recordkeeping system outlined during the course participants complete the farm tax schedule (IRS Schedule F), a depreciation schedule and the self-employment tax schedule. Tax planning implications are also considered. b. Cost Budgeting elective: using good records and a computer program participants accurately determine the costs and returns from an optimal production system. Programs with beginning farmers are just now beginning so there are no specific participant outcomes yet to report. Based upon comprehensive, in-depth post-course evaluations, the curriculum will be improved as necessary during the subsequent 2 years that will help to strengthen participant outcomes.

PUBLICATIONS: 2009/09/01 TO 2010/08/31

no publications reported this period