

Title:	Farm Transition and Beginning Management Training for Women Farmers and Ranchers		
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Program Code: BFRDP

Program Name: Beginning Farmer and Rancher

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Recipient Organization

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Departments

{NO DATA ENTERED}

Value-Added Agriculture

Non-Technical Summary

Women are generating a cultural tide in American agriculture that is moving management, assets and opportunities to a new wave of beginning farmers and ranchers across the country. The 985,192 female operators reported in the 2007 USDA Census of Agriculture make up 30 percent of all farm operators. Yet, women farmers and ranchers are an underserved audience. Women have unique learning preferences that are often not served through traditional farm management education programs. This project brings educational teams or working groups together to benefit women beginning, mid-career, and retiring farmers and ranchers in 20 states. Delivery of local Level I and Level II Annie's Project courses will provide women with unbiased research based information and access to local service providers. Level I courses teach women to manage all five areas of business risk: financial, human resource, legal, marketing and production. The project teams will develop a new Level II special topic course on Farm and Ranch Transition Planning that provides more in-depth training. Older generations who control the majority of assets and younger generations who seek to establish firm financial footings and learn to manage the farm or ranch business need educational support to implement generational transition strategies that lead to improved profitability, greater food security, increased rural lifestyle satisfaction, and enhanced agricultural sustainability. Creating and then capitalizing on the empowered role of women is an innovative approach to benefiting beginning farmers and ranchers.

Accomplishments

Major goals of the project

The goal of experienced Extension educators and Farm Credit Council and Associations project leaders is to support beginning, mid-career and retiring women farmers and ranchers with educational courses to improve profitability, smooth the transitions of natural business cycles and encourage generational exchange. The project objectives are: 1) Curricula: develop Annie's Project Level II Farm and Ranch Transition Planning curricula; 2) Working Groups: build beginning farmer programming capacity through three working groups; 3) Marketing: recruit women farmers and ranchers to participate in educational programs through national and local marketing; 4) Training: provide technical assistance to 3,000 women farmers and ranchers; and 5) Evaluation: generate new knowledge through needs assessment and outcome measurement. The specific outputs related to the objectives are: 1) Curricula: assess 20 available curricula in year 1, develop and revise Farm and Ranch Transition Planning course in year 1, deliver pilot courses at 12 sites in year 1, and develop and print 200 pilot participant workbooks in year 1 and 1,300 revised workbooks in years 2-3; 2) Working Groups: the National Curricula Development (NCD) and the Iowa Beginning Farmer (IBF) working groups will be newly organized while the Annie's National

Network Initiative for Educational Success (ANNIES) working group will be strengthened: 25 people will participate in NCD including farmers, NCD will meet face-to-face 1 time and teleconference 6 times each year, 40 people will participate in IBF including farmers, IBF will meet face-to-face 3 times and teleconference 3 times each year, 150 Extension professionals will participate in ANNIES, teleconferences will be held monthly, and national face-to-face meetings and professional capacity building workshops will be held in years 1 and 3; 3) Marketing: information will be published on the project and courses for farm and ranch women in 10 Farm Credit newsletters each year, new content will be posted to ANNIES Public and Educator websites monthly, 4 articles will be published in national farm media each year, 25,000 PR items will be given away in total, 1 new video will be produced each year, and 6 exhibits/presentations will be conducted at major farm shows/conferences each year; 4) Training: 12 Level II Farm and Ranch Transition Planning pilot courses will be delivered to 200 participants in 10 states in year 1, 74 tested and revised Level II transition courses will be delivered to 1,300 participants in 20 states in years 2-3, and 86 Level I courses will be delivered to 1,500 participants in 20 states in years 1-3; 5) Evaluation: 16 stakeholder focus groups will be conducted in years 1-3, 16 new evaluation instruments will be designed in years 1-3, 3,000 participant data sets will be collected and processed in total, data will be analyzed and reports prepared quarterly, recommendations for beginning farmer programming will be prepared annually, 2 presentations will be given at professional conferences annually, and final project findings and recommendations will be submitted to 2 referred journals in year 3.

What was accomplished under these goals?

Issue: This project addressed farm/ranch transition planning. Women are the heart of family farms/ranches and they have significant ownership, management, and employment on those family farms/ranches. Our project team believed that with training and support, women could initiate important conversations and guide their families or other partners through business, estate, retirement and succession planning. We wanted to design a new course/curricula to help women use their influential roles as communicators and decision makers to develop successful transitions among established and beginning farmers/ranchers.

Activities: Our project team members were experienced Annie's Project educators. Annie's Project is a farm management course for women that began in Illinois in 2003. Our 38-member course/curricula team developed a new program on transition planning using Annie's Project best education practices for farm/ranch women. The fifteen-hour course and 300 page workbook is called "Managing for Today and Tomorrow" and includes information on overall transition planning and four key components of business, estate, retirement and succession planning.

Results: There were 237 farm/ranch women from 10 states who participated in Managing for Today and Tomorrow courses and also responded to surveys in Years Two and Three. Respondents validated our training methods. There were 96% who agreed the course included hands-on activities to help them understand and apply the information presented. There were 99% who agreed the course provided un-biased research based information. And 98% who agreed they felt prepared to take steps to become better farm/ranch business partners. Survey respondents listed estate planning concepts and tools, the big picture of transition planning, and improving family communication as the top three most valuable topics. Other top ten most valuable topics were: goal setting, methods of asset transfer, inheritance tax and use of trusts, Ag Plan and business planning, transition planning flowchart, communication barriers, and retirement planning.

As evidence of learning, pre-course survey respondents indicated 33% knew about farm/ranch and personal balance sheets, while post-course survey respondents indicated 73% knew this. Pre-course survey respondents indicated 20% knew the difference between "fair" and "equal" distribution of assets and management, while post-course survey respondents indicated 77% knew this. Pre-course survey respondents indicated 8% knew how to create a retirement timeline that includes personal and farm/ranch business goals, while post course survey respondents indicated 67% knew this. Pre-course survey respondents indicated 7% knew how to combine business, estate, retirement and succession planning to create a transition plan, while post-course survey respondents indicated 57% knew this.

As evidence of actions taken during the five-week courses, pre-course survey respondents indicated 61% had calculated their net worth, while post-course respondents indicated 73% had done this. Pre-course survey respondents indicated 24% had written decisions on power of attorney or other substitute decision making; while post-course respondents indicated 47% had done this. Pre-course survey respondents indicated 21% had estimated how long their retirement savings will last, while post-course survey respondents indicated 28% had done this. Pre-course survey respondents indicated 17% analyzed farm/ranch strengths, weaknesses, opportunities, and threats; while post-course survey respondents indicated 35% had done this. In a follow-up survey of participants 6 months to 2 years after their course, 29 respondents from 6 states indicated that 86% shared course information with primary farm/ranch partners or family members, 76% were part of businesses that choose a family member successor, and 3% had chosen a non-related successor. Respondents told us 23% of them made a lot of progress towards the top two priority goals they identified during their course, and 58% made some progress. Time constraint was the most listed factor that limited progress.

Farm/Ranch Women Outcomes: Beginning farm/ranch women were empowered to begin or improve agricultural businesses and to understand the desires and transition planning needs of established farmers/ranchers. Retiring farm/ranch women were empowered to identify business successors and plan gradual transitions of labor, management, risk, and ownership to beginners. Mid-career women identified with both beginning and retiring famers/ranchers and were empowered to lead transitions on both ends of their careers. Farm/ranch women who enrolled in the transition planning courses made significant knowledge gains and took important actions to implement farm/ranch transition plans. They communicated widely with family

members and partners. Transitioning a profitable and on-going farm/ranch business, whether to family members or non-related partners, helped beginning farm/ranch women and their families/partners gain necessary management skills and utilize existing assets to continue agricultural production; and helped established farm/ranch women and their families/partners gradually reduce their business risk and labor commitment. Transition planning improved rural lifestyle satisfaction, maintained family farmers/ranchers on the land, and diverted the sale and disassembly of farm/ranch businesses. The most important outcome of this project on farm/ranch women was greater understanding of the responsibilities by all generations to manage effective transitions through business, estate, retirement and succession planning. The courses helped farm/ranch women and their families/partners accept transition planning as normal, necessary, and doable.

Educator/Partner Outcomes: This project was led by Iowa State University Extension and Outreach. The Annie's Project Education for Farm Women, an Illinois nonprofit organization (NPO) founded in 2010, was the subcontractor on the grant. Through this project, the NPO was able to hire staff, strengthen its organization, and position itself for long term viability and mission accomplishment. Their mission is to empower farm/ranch women to be better business partners and owners through networks and by managing and organizing critical information. The Annie's Project educator network was strengthened and expanded through this project. There were 185 educators who increased their professional capacity to offer high quality farm/ranch transition planning courses for women. Farm Credit partners were inspired to assist, advise, and financially support local Annie's Project programs. Farm Credit partners saw the benefits of "Managing for Today and Tomorrow" courses and provided more than the required 25% of cost-share for this project. Several statewide partnerships among Farm Credit and extension educators grew out of this project which will help to support the delivery of future courses. The 38-member curricula development team, shared resources and experiences, identified important transition planning topics, developed learning objectives, and developed the new curricula. The 34-member Iowa Farm Transition and Beginning Farmer working group developed the transition planning flowchart and reviewed the curricula, toured successfully transitioning farm/ranch businesses, brought in speakers, marketed "Managing for Today and Tomorrow" courses and each other's programs, and shared program needs, events and results. The working group agreed to continue meeting beyond the grant period because members value collaboration and information sharing.

The most important outcome of this project on educators/partners was synergistic, strategic and dedicated partnerships that enable broad delivery of high quality programs even with limited resources. The strength of the educator and partner networks

What opportunities for training and professional development has the project provided?

Our team provided 22 train-the-trainer events during the project period, reaching 185 different educators from 29 states through twelve-hour (on average) professional development programs. About one-third of these educators attended more than one event. On a scale of 1 to 5, with 5 being high, educators who responded to our surveys ranked both the quality of training and the usefulness of resources at 4.7 on average. Respondents also chose the topic that was most important to them. There were 38% of survey respondents who chose teaching tips to deliver Managing for Today and Tomorrow/Annie's Project as the most important topic. There were 24% who chose classroom resources; 21% who chose people they met; 14% who chose Managing for Today and Tomorrow/Annie's Project teaching websites; and 2% who chose funding partnerships as most important.

This Beginning Farmer and Rancher Development Program (BFRDP) project offered many professional development opportunities for the project team itself. This was the largest grant project our team has managed in terms of fiduciary responsibility and complexity. This provided our team with endless challenges and accomplishments. We set out to develop farm transitioning curricula and then share the curricula and methodology widely. As a result, the Annie's Project educator network was expanded and strengthened. We involved an astonishing 236 educators and partners who contributed to three major groups: educator network, curricula development team, and Iowa Farm Transition and Beginning Farmer working group. As an example of the value of our partners, Farm Credit Services of America hosted a large train-the-trainer event at their offices and provided meals, coordination and more. Another example is how we partnered with the National Farmers Union to offer the "Managing for Today and Tomorrow" course as part of their National Women's Conference in January 2014, thus spreading the word about the courses we offer and the importance of farm/ranch transition planning to many states. This project helped the Annie's Project Education for Farm Women non-profit organization grow and mature as they accepted and delivered on more and more responsibilities each year of the project. For example, they hired and managed staff, helped develop curricula, regularly contributed to team planning, formatted and distributed marketing materials, organized and delivered train-the-trainer programs, and developed project reports. Ruth Hambleton is the founder of the Annie's Project program and organization and served as project co-director on this BFRDP grant.

There were 7 members of our Iowa team attending the 2012 BFRDP Project Directors meeting in Rochester, MN (since it was nearby), and 1 co-director attending the 2013 BFRDP Project Directors meeting in McAllen, TX. These were both excellent professional opportunities and we presented a poster at the first conference and a workshop at the second conference. Meeting other BFRDP educators directly led to developing a new partnership with Kentucky State University we would otherwise not have had the opportunity for. We also developed relationships with others who are working with an audience of farm/ranch women.

Our team regularly attends the Risk Management Education National Conferences. From 2012 to 2014, we presented two

posters and two workshops specifically on "Managing for Today and Tomorrow" at these events. We had the opportunity to work with and learn from the Evaluating and Improving Educational Instruments and Outreach BFRDP Educational Enhancement Team, attending and presenting at three events they hosted. Various team members took our project to 18 conferences/meetings during the project period. We attended and grew our networks at a national Farm Bureau conference, a national Farm Credit conference, yearly Professional Agricultural Workers Conferences, Women in Ag conferences, Small Farmers conferences, and Extension conferences and workshops. These presentations helped create interest in our project from both educators/partners and farm/ranch women.

Our team has now submitted our first collaborative journal article and we hope to see it published in the Journal of the National Association of County Agricultural Agents in 2015. We also submitted a poster for judging and exhibition at the NACAA national conference in July 2015.

For a long time, we wanted to increase our professional skills and professionalism in the area of project evaluation. This BFRDP project provided the first opportunity to do this, as it gave us the funds to hire and learn from a third party evaluator. The collaboration with the Research Institute for Studies in Education at Iowa State University has improved our team's evaluation and reporting skills not only on this project, but on others as well.

Our Iowa educator team delivered/taught 15 fifteen-hour "Managing for Today and Tomorrow" courses in our state during the three-year project. We also delivered/taught the course during the 2014 National Farmers Union Women's Conference, which was a valuable experience. Our team learned a great deal about the needs and preferences women have as they seek to contribute to successful farm/ranch transition planning and we applied this experience to improve "Managing for Today and Tomorrow" and other farm transition programs.

Working with educators from other states to develop curricula was a positive learning experience. We developed a good collaborative process that we have now used to develop other curricula, too. This gave us the opportunity to hone our curricula development skills such as managing teamwork, editing, developing learning objectives, and creating teaching instructions.

Marketing our extension programs was another area of significant learning for our project team. We are proud of the beautiful workbook we produced and received many positive comments on it from women who participated in the "Managing for Today and Tomorrow" courses. Women told us they felt like "somebody cared." And we did! In the process of marketing this course, we slightly updated the Annie's Project logo to make it a little more appealing which was surprisingly appreciated. We worked hard to use video content in new ways, developing our first video "reports," sharing videos on social media, and combining news articles with video links to strengthen our messaging.

We initiated this BFRDP project because of the requests we were getting from farm/ranch women to offer more training on transition planning. At the time, we had no idea how much this project would also help us grow professionally. Our team very much appreciates the opportunities we had through this project.

How have the results been disseminated to communities of interest?

The following objectives, accomplishments, and outcomes summarize the work of the project team and the impacts generated. Each of the objectives includes sharing of results.

Objective One was to develop an Annie's Project farm/ranch transition planning curricula. The project team assessed 48 resources on farm/ranch transition planning; developed and then revised a 300 page participant workbook; and developed an instructor manual with course methodology and teaching tips. The team printed and assembled 240 first edition workbooks and piloted seven courses in Year One. Curricula improvements were made and 560 second/third edition workbooks were shared with educators attending train-the-trainer events, as well as, with farm/ranch women participating in courses in Years Two and Three. The key outcome of Objective One was high quality curricula and teaching methods that supported women and their families/partners in farm/ranch transition planning.

Objective Two was to build the capacity of educators to deliver/teach high quality farm/ranch transition planning courses. The project team shared results with and coordinated three working groups: 1) a ten-state curricula development team, 2) an Iowa Farm Transition and Beginning Farmer working group, and 3) a national network of Annie's Project educators. The 38-member curricula development team hosted a face to face meeting attended by 19 educators/partners in Year One and met via conference calls/webinars nine times. The 34-member Iowa Farm Transition and Beginning Farmer working group met face to face six times, and via conference calls/webinars six times during the project. The network of educators were invited to 29 monthly conference calls/webinars and the average participation was 12. The project team distributed 24 monthly or bi-monthly newsletters to the network of educators. The project team provided support and assistance to educators on a daily basis. One example of this support was face to face training for Kentucky State University BFRDP educators and then attending and presenting at their first Annie's Project course. Other examples are guiding educators to online curricula and other materials, distributing workbooks, making connections with industry and government financial sponsors, answering questions on teaching methods, and providing course evaluation and reporting. The key outcome of Objective Two was an expanded and strengthened educator network eager to train farm/ranch women on transition planning and management topics.

Objective Three was to market educational programs to farm/ranch women to increase awareness of women's roles in transition planning and management. The project team shared results by publishing 28 articles on the BFRDP Clearinghouse, Start2Farm. The articles included success stories, curricula and other resources, and videos. The project team enhanced its

online presence by establishing a website for educators with course delivery materials, using more social media, and contributing to the new Women in Ag Learning Network on www.eXtension.org. The national Annie's Project Facebook page has 1,436 Likes, and our Iowa page has 124 Likes. The project team partnered with Farm Credit, Farm Service Agency, and others to include course notices and news articles in their newsletters and social media. The number of these notices/newsletters is estimated at 616 nationally. The team created eight new videos designed to inspire future participants and two new videos designed to inspire more educator outreach to farm/ranch women. The team prepared three press release templates for use by partnering states: 1) BFRDP project announcement, 2) local course coming soon announcement, and 3) local course graduation announcement. Approximately 111 published news stories resulted. Successful Farming magazine and other national media wrote and published additional stories, as did local magazines and newspapers. As an example see http://www.agriculture.com/family/agricultural-education/continuing-education/nies-project-exps-estate-trsitions-help_363-ar21597. Brochure, poster, and advertisement templates were also designed and shared. Iowa and partnering states distributed approximately 7,400 brochures, posters or other printed promotional pieces. The Iowa team exhibited/spoke at 18 events during the project period. Examples include Nebraska Women in Ag Conference, Iowa State University Beginning Farmer Network Conference, and Farm Progress Show. The key outcome of Objective Three was increased awareness of farm/ranch transition planning and women's important management roles on the farm/ranch. Objective Four was to provide transformational learning for farm/ranch women on transition planning. The project team delivered/taught seven pilot "Managing for Today and Tomorrow" courses in four states (IA, IL, MI, and MO), reaching 101 women in Year One/2012. The project team delivered 18 revised courses in nine states (DE, IA, IL, IN, MD, MI, MS, ND, OH), reaching 168 women in Year Two/2013. The project team delivered 12 revised courses in six states (FL, IA, IL, MD, MO, SD), reaching 197 women in Year Three/2014. One of the courses was part of the 2014 National Farmers Union Women's Conference. Overall, the project team shared 37 courses in 12 states with 466 farm/ranch women during the project period. The average "Managing for Today and Tomorrow" class size was 13 women. The key outcome of Objective Four was that farm/ranch women significantly increased their knowledge of transition planning tasks, began to implement transitions, accessed relevant resources, and developed helpful networks with other farm/ranch women and professionals/service providers in their communities.

Objective Five was to create new knowledge through robust needs assessment and outcome measurement. The project team met with three unique focus groups after the pilot program delivery in Year One to assess the effectiveness of the new curricula and identify areas for improvement. The team used the Iowa Farm Transition and Beginning Farmer Working Group as a fourth focus group. The project team included discussion time on areas for improvement in train-the-trainer events. This was especially valuable during the July 2014 national Annie's Project educator meeting which set aside one whole day for program improvement. The evaluation team trained educators on the use of the evaluation instruments via annual webinars and train-the-trainer events. The team prepared and modified three farmer/rancher evaluation instruments: pre-course, post-course, and follow-up surveys. The team collected and processed course data sets from 31 of the 37 courses. Course reports were provided to the educators as courses occurred. National reports were compiled and analyzed each year. We did not get a good response rate on our follow-up survey. That is something we will work to improve in the future. The team presented/published project results with two poster presentations and two workshop presentations on "Managing for Today and Tomorrow" at three Risk Management Education National Conferences. The team shared this project with educators by giving 18 presentations nationally, including annually at the Professional Agricultural Workers Conference. The team submitted a journal article and a poster to the National Association of County Agricultural Agents for publication in 2015. The key outcome of Objective Five was that program evaluation validated our methodology and curricula decisions, while also guiding us in making program improvements each year of the project. Local educators also used the results to immediately improve their delivery of local courses.

What do you plan to do during the next reporting period to accomplish the goals?

This BFRDP project is now completed and we won't be providing a formal report again. However, our project team is very proud of the longevity we built into this grant project. By growing our educator networks, providing professional development and train-the-trainer opportunities, improving and posting our curricula and teaching tools, telling the stories that inspire farm/ranch women to take on influential management roles, and building supportive statewide partnerships; we set the stage for this curricula to benefit many more farm/ranch women. If just half of the 185 newly trained educators deliver/teach just one "Managing for Today and Tomorrow" transition planning course, with an average of 13 participants per course, we could reach an additional 1,202 farm/ranch women. We fell short of our BFRDP project goal to deliver 86 courses and reach 1,500 farm/ranch women during the project period. What we did accomplish was 37 courses, reaching 466 farm/ranch women with the new "Managing for Today and Tomorrow" course within the project period. With the groundwork we established, it is very likely the original grant goal will be achieved outside the project period.

Participants

Actual FTE's for this Reporting Period

Role	Non-Students or faculty	Students with Staffing Roles			Computed Total by Role
		Undergraduate	Graduate	Post-Doctorate	
Scientist	0.5	0	0	0	0.5
Professional	1.2	0	0	0	1.2
Technical	0	0	0.1	0	0.1
Administrative	0	0	0	0	0
Other	0	0	0	0	0
Computed Total	1.7	0	0.1	0	1.8

Student Count by Classification of Instructional Programs (CIP) Code

Undergraduate	Graduate	Post-Doctorate	CIP Code
	1		13.06 Educational Assessment, Evaluation, and Research.

Target Audience

Farm/Ranch Women: Project team members and our network of educators/partners delivered/taught 37 fifteen-hour "Managing for Today and Tomorrow" courses in 12 states, reaching 466 farm/ranch women in 28 states. One of the courses was part of the National Farmers Union Women's Conference in 2014, so this drew women from several states. The farm/ranch women participating in the courses were from: AL, CA, CO, DE, FL, IA, IL, IN, MA, MD, MI, MN, MO, MS, MT, ND, NE, NH, NJ, OH, OK, PA, SC, SD, TX, VA, WI, and WY.

Farm/ranch women who participated in "Managing for Today and Tomorrow" courses and responded to surveys in Years Two and Three came from various sizes of farms/ranches with 12% describing their businesses as having 0 to 49 acres, 37% as having 50 to 499 acres, 37% as having 500 to 1,000 acres, and 14% as having 2,000 or more acres. The majority of survey respondents owned their farm/ranch businesses as sole proprietorships, and family corporations were the second most common form of ownership. Nearly half of all respondents raised cattle or calves. Poultry/eggs, hogs/pigs, and horses/ponies were the next most commonly raised livestock. Nearly nine in ten survey respondents raised grains, oilseeds, dry beans or dry peas. Vegetables, hay/pasture and fruits/nuts were the next most commonly raised crops.

Course participants responding to our surveys in Year Two and Year Three said 38% had taken other Annie's Project courses prior to taking the "Managing for Today and Tomorrow" course. Respondents identified their career stages. There were 14% who were not currently farming/ranching but planned to start, 76% who were farming/ranching and planned to continue, and 10% who were currently farming but planned to stop within five years. Respondents told us how long they had been farming/ranching: 5% said less than 1 year, 15% said 1 to 10 years, 15% said 11 to 20 years, 24% said 21-30 years, 25% said 31-40 years, 12% said 41 to 50 years, and 4% said more than 50 years. Respondents told us their age group: 5% were younger than 25, 8% were 25-34, 17% were 35 to 40, 25% were 45 to 54, 29% were 55 to 64, 13% were 65 to 74, and 3% were 75 and older. Respondents identified their racial ethnic groups. There were 98% who were White/European American. 0.5% who were Black/African American, 1% who were Native American Indian/Alaskan Native, and 0.5% who were Pacific Islander/Asian American.

Educators/Partners: To expand the reach of the new "Managing for Today and Tomorrow" transition planning curricula/course, our project team trained 185 different educators during 22 twelve-hour (on average) train-the-trainer programs. Our project team also led a new 38-member curricula/course development team from ten states and a new 34-member Iowa Beginning Farmer Working Group. In total, there were 236 different educators and partners involved in this project from 29 states: AL, AR, AZ, CO, FL, IA, ID, IL, IN, KY, LA, MD, MI, MN, MO, MS, ND, NE, NH, NJ, OH, OK, PA, SC, SD, TX, VA, WI, and WY.

Products

Type	Status	Year Published	NIFA Support Acknowledged
Conference Papers and	Published	2012	YES

Citation

Eggers, T., Johnson, J., Kirkpatrick, J., and Sobba, M. (2012, March). "Retirement Planning for Farm and Ranch Families." Paper presented at the Women in Ag Educators National Conference, Memphis, TN. (http://www.agrisk.umn.edu/conference/uploads/TEggers1115_01.pdf)

Type	Status	Year Published	NIFA Support Acknowledged
Conference Papers and	Published	2013	YES

Citation

Schultz, M., Eggers, T., Hambleton, R., and Wells, B. (2013, April). "Managing for Today and Tomorrow: Business, Estate, and Retirement Planning for Farm and Ranch Women." Poster presented at the Extension Risk Management Education National Conference, Denver, CO. (<http://www.agrisk.umn.edu/Library/ConferenceMaterials.aspx?ConfID=11>)

Type	Status	Year Published	NIFA Support Acknowledged
Conference Papers and	Published	2013	YES

Citation

Wells, B., Devlin, K., Eggers, T., Hambleton, R., Johnson, J., Leibold, K., Schultz, M., and Sobba, M. (2013, April). "Managing for Today and Tomorrow: Navigating the Farm and Ranch Transition Puzzle." Paper presented at the Extension Risk Management Education National Conference, Denver, CO. (<http://www.agrisk.umn.edu/Library/ConferenceMaterials.aspx?ConfID=11>)

Type	Status	Year Published	NIFA Support Acknowledged
Conference Papers and	Published	2014	YES

Citation

Schultz, M. and Anderson, M. (2014, April). "Managing for Today and Tomorrow: Farm and Ranch Transition Planning Outcomes" Poster presented at the Women in Agriculture Educators National Conference, Indianapolis, IN. (<http://www.agrisk.umn.edu/Library/ConferenceMaterials.aspx?ConfID=13>)

Type	Status	Year Published	NIFA Support Acknowledged
Journal Articles	Submitted	2015	YES

Citation

Schultz, M., Anderson, M., Eggers, T., Hambleton, R., and Leibold, K. "Evaluation Results on Managing for Today and Tomorrow Transition Planning Courses for Farm and Ranch Women." Journal of the National Association for County Agricultural Agents." (Not yet published.)

Type	Status	Year Published	NIFA Support Acknowledged
Conference Papers and	Submitted	2015	YES

Citation

Schultz, M., Anderson, M., Eggers, T., Hambleton, R., and Leibold, K. "Evaluation Results on Managing for Today and Tomorrow Transition Planning Courses for Farm and Ranch Women." Poster presented at the National Association for County Agricultural Agents Conference, Sioux Falls, SD.(Not yet published.)

Other Products

Product Type

Audio or Video

Description

2014 "Kris and Patty Walker, Managing for Today and Tomorrow Participants." The video (<https://vimeo.com/110527260>) was created to highlight the project impacts on one farm family two years later, after being part of the first BFRDP Managing for Today and Tomorrow in 2012. The video was debuted in the Iowa State University "Stories" magazine (Crucial Conversations: Managing for Today and Tomorrow, <http://stories.cals.iastate.edu/category/partner-profile>). Farm and ranch women interested in transition planning, as well as, project partners benefited.

Product Type

Audio or Video

Description

2014 "Jenny Hemmingway, Managing for Today and Tomorrow Participant." The video (<https://vimeo.com/107112177>) was created to share the story of a farm woman working with family. Jenny's and other participant stories were publicized in Iowa Farmer Today and other papers (<http://www.extension.org/pages/71759/managing-for-today-and-tomorrow:-transition-planning-for-farm-and-ranch-women#.VPtrrmc5CAU>.) Farm and ranch women interested in transition planning, as well as, project partners benefited.

Product Type

Audio or Video

Description

2014 "National Extension Educators Talk About Annie's Project." The video (<https://vimeo.com/105715365>) was one of two created for a video report to BFRDP and other funders and project partners. It highlights why educators see a need for programming directed towards women. A related article is posted at <http://www.extension.iastate.edu/annie/1Newsletters/2014/July2014ANNIESnews.pdf>. Educators and partners benefited.

Product Type

Audio or Video

Description

2014 "Highlights from Annie's Project National Educator Conference, July 2014." The video (<https://vimeo.com/105728044>) was one of two created for a video report to BFRDP and other funders and project partners. It is an overview of the educator training we provided with BFRDP and other funders and project partners. Educators and partners benefited.

Product Type

Audio or Video

Description

2013 "Annie's Project: Rexanne and Brandi's Story." The video (<https://vimeo.com/74666529>) was created to share a farm transition story from a mother and daughter. It was debuted at the IA Annie's Project Tenth Anniversary Conference, then distributed in an article (<http://www.extension.iastate.edu/article/annies-project-four-iowa-women-share-their-stories>). Farm and ranch women interested in transition planning, as well as, project partners benefited.

Product Type

Audio or Video

Description

2013 "Annie's Project: Sara's Story." The video (<https://www.youtube.com/watch?v=XJlLbel7rAk#t=19>) was created to share a farm transition story of a woman who took over the family farm during her father's terminal illness. It was debuted at the IA Annie's Project Tenth Anniversary Conference, then distributed in an article (<http://www.extension.iastate.edu/article/annies-project-four-iowa-women-share-their-stories>). Farm and ranch women interested in transition planning, as well as, project partners benefited.

Product Type

Audio or Video

Description

2012 "Annie's Project in their Own Words." This video (<https://www.youtube.com/watch?v=OGnzQvKx7Hc>) was created to show that Annie's Project is helpful to diverse women across the country and to encourage participation. Farm and ranch women, as well as, project partners benefited.

Product Type

Audio or Video

Description

2011 "Annie's Project is Developing Farm Transition Planning Course." The video (<https://vimeo.com/28956754>) was created along with a press release (<http://farmprogress.com/story-annies-project-to-develop-second-level-course-37-53772>) to announce the project. Farm and ranch women, as well as, project partners benefited.

Product Type

Databases

Description

Participant Data Base: We did our best to gather a participant data base with contact information of farm and ranch women who participated in the Managing for Today and Tomorrow farm transition courses. Our data base contains 374 participants from 13 states. Educators and partners benefited.

Product Type

Databases

Description

Educator Data Base: We did our best to gather an educator data base with contact information of extension and other educators who participated in train-the-trainer events on teaching farm transition planning. Our data base contains 215 educators from 28 states. Educators and partners benefited.

Product Type

Educational Aids or Curricula

Description

Farm Transition Curricula: With our BFRDP project team, we created the Managing for Today and Tomorrow farm transition planning curricula in 2011 and then revised and improved it in both 2012 and 2013. The workbook is 300 pages and includes learning objectives, hands-on activities, and much more. The curricula is posted on our website at <http://www.extension.iastate.edu/feci/annie/bfrdp/>, as well as, on Start 2 Farm. Farm/ranch women benefited. interested in transition planning, as well as, project partners benefited.

Product Type

Educational Aids or Curricula

Description

Teaching Instructions: With our BFRDP project team, we created teaching instructions for educators offering the Managing for Today and Tomorrow farm transition planning curricula in 2011 and then revised and improved it in both 2012 and 2013. The teaching instructions are posted on our website at <http://www.extension.iastate.edu/feci/annie/bfrdp/>, as well as, on Start 2 Farm. Educators and partners benefited.

Product Type

Educational Aids or Curricula

Description

Train-the-Trainer Materials: With our BFRDP project team, we created additional train-the-trainer materials to supplement the teaching instructions. The materials focused on best practices for offering effective extension programs for farm and ranch women on transition planning; recruiting the audience, obtaining and using evaluation results and more. Educators and partners benefited.

Product Type

Evaluation Instruments

Description

Pre-Course: Our evaluation team completed a pre-course survey in year one of the project and revised this in year two. The survey is posted on the web at <http://www.extension.iastate.edu/feci/annie/bfrdp/cdi.html>. The survey benefits educators and partners who in turn use this to improve courses for farm and ranch women.

Product Type

Evaluation Instruments

Description

Post-Course: Our evaluation team designed a post-course survey in year one of the project and revised this in year two. The survey is posted on the web at <http://www.extension.iastate.edu/feci/annie/bfrdp/cdi.html>. The survey benefits educators and partners who in turn use this to improve courses for farm and ranch women.

Product Type

Evaluation Instruments

Description

Follow-up: Our evaluation team designed a follow-up survey in year three of the project. The survey was used to gather long-term impacts from the education and resources provided to farm and ranch women. The survey benefits educators and partners who in turn use this to improve courses for farm and ranch women.

Product Type

Evaluation Instruments

Description

Educator Survey: The training team led by the Annie's Project Not-For-Profit created a post-training survey tool to assess the value of this training to educators. The survey benefits educators and partners who in turn use this to improve courses for farm and ranch women.

Product Type

Audio or Video

Description

2013 "Annie's Project: Julie's Story." This video <https://www.youtube.com/watch?v=j9Yur8c4xoA> was created to show the needs farm/ranch women have to keep learning new skills that help them maintain for grow their agricultural businesses. Farm/ranch women, as well as, project partners benefited.

Product Type

Audio or Video

Description

2013 "Annie's Project: Linda's Story." This video <https://www.youtube.com/watch?v=3xh0JdAFtsA> describes Linda's journey from an off-farm career to working in the farm business full time. Farm/ranch women, as well as, project partners benefited.

Product Type

Databases

Description

Project Partner Bios and Contacts: At the request of our partners, we created a document that included photos, names, contact information and brief bios of all project partners. This was very helpful to all our partners.

Changes/Problems

The biggest problem for our team was the death of our good friend and colleague, Bob Wells (IA), on October 4, 2013. He not only served as co-project director, but was the initiator, visionary and driver for the meaningful work we were doing together. Although other team members each stepped up, the project definitely took a downslide for a few months. In our

case working through this loss and trying to replace our colleague's efforts, contributed to a delay in organizing educators, materials and partners for course delivery in 2014. We also lost Michael Roberts (NC), who died on October 18, 2013. Mike was an important project collaborator with valuable extension farm management experience. We are proud of our team work and ability to get back on track, but it wasn't easy. The potential loss of key persons is exactly the type of situation we encourage farm/ranch women to think about as we teach them to develop plans for transitions and risk management. The lesson learned is that we need to take the time to make our own contingency plans so that when the unexpected happens, we can go forward a little more smoothly.

Annie's Project has been an on-going program since 2003. The Managing for Today and Tomorrow farm transition course and curricula is new, and would not have happened without the BFRDP grant opportunity and teamwork of educator colleagues in several states. When we prepared our grant application, we didn't get it quite right because we mixed up some of the things we were already doing, with some of the new things we wanted to do. For example, the grant funded train-the-trainer programs, but it did not fund local delivery of Annie's Project standard courses. Many of the new educators we trained wanted to start with an Annie's Project standard course first and then move to offer a Managing for Today and Tomorrow course next. This is just one way that measuring impacts got a little fuzzy. The lesson we learned early on is that counting Annie's Project standard courses in the results of this grant project is not an accurate or "real" reflection of resource use. Therefore, those numbers are not included in this report. In future projects, we will be more careful to correlate resource use to impacts projected.

We brought together 236 different educators and partners for this grant project. This was quite fun, but quite challenging. We started the project with partners in 10 states who wanted to help develop materials and offer courses locally. Some of those 10 had to step back due to shifting extension resource allocations and priorities, as well as job changes. All of this meant quite a few challenges in maintaining beneficial relationships and project continuity. Out of necessity those who knocked the loudest, got the most help, despite our preference to be really good partners for everyone. A lesson learned is that we have to make each contact with our educators/partners as meaningful as possible, because we simply may not have other opportunities. We have to try to meet their needs for resources, professional development or just experience sharing and encouragement the first time.

With all of the groups and all of the activities, we struggled to keep everything moving forward and to gather and report impacts. We were juggling needs assessment, marketing, program development, curricula improvements, course delivery, evaluation and reporting simultaneously. We were also supporting a rapidly growing educator network in 29 states. We operated with a dedicated and hardworking leadership and management team that met twice monthly. However, it was still a challenge to manage the people and the processes necessary to reach our project goal of delivering/teaching 86 Managing for Today and Tomorrow courses. The lesson learned is that directing a project of this scope and scale requires one person's focused management time, even when the co-project directors and other team members are great partners. This should be carefully considered when allocating time commitments on future projects.

Developing high quality curricula is hard work. We had good ideas to get the curricula put together and get it piloted in Year One. However, we lacked the processes and time commitments necessary to really make improvements to make the curricula the very best it could be in Years Two and Three. We had some really good evaluation tools and experiences that helped us understand the curricula's strengths and weaknesses, but little opportunity to make improvements. A lesson learned is that continual program improvement is an appropriate goal to allocate resources to with greater detail and tenacity in multi-year projects. It just may make the difference from good to great curricula.

Without a doubt, the single most disappointing aspect of this project was cancelled courses due to low registration numbers. Educators attempted to offer 12 more Managing for Today and Tomorrow courses in 6 states (IA, IL, IN, MD, MO, and OH) in addition to the 37 successful courses reported here. It was disappointing when these classes did not meet minimum attendance requirements. In Iowa our minimum registration requirement is 10, but each state is different. Because educators had already put a lot of energy and other resources into delivering those courses, and because there was not enough interest by local farm/ranch women to hold the courses, educators became discouraged. The lesson learned is that farm/ranch transition planning can be a difficult and emotional topic. Women needed more time than usual to learn about the course, and think about what attending could mean for them and their families. Also, some women perceived this to be a very specific topic that only applied if they were "going through" a transition. We needed more marketing and outreach to help women understand that there are many stages in transition planning and it is never too early or late in the life of the farm/ranch business to consider business, estate, retirement and succession planning.