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Non-Technical Summary

In the innovative and competitive agri-food business environment there is increasing need for improved beginning farmer training materials, especially those concerning financial skills and business literacy. To address this need the Farm Credit Council and the Wallace Center at Winrock International propose "Evaluating and Improving Educational Instruments and Outreach (EIEIO) for Beginning Farmers" to establish a new Beginning Farmer and Rancher Educational Enhancement Team. The EET, targeting the Southern region, will improve BFR training programs' ability to provide financial education, enhancing the success of BFRs. The EET will accomplish its goals through a Community of Practice that links experienced business and financial literacy experts with BFR training staff. The Community of Practice will be a mechanism for networking and communication, enabling participants to share best practices, identify obstacles and test new approaches in a supportive, facilitated environment. It will improve the effectiveness of BFR training programs by engaging a team of experts to evaluate the content, gaps, suitability, and effectiveness of delivery methods. This team of experts will develop tools to evaluate BFR financial skills curricula, including curriculum content, teaching methods, technology, and educational outcomes. The project will distribute the Community of Practice's learnings in a Trainers' Resource Guide available nationally through Start2farm.gov. Farm Credit's expertise and role as the leading lender to young and beginning farmers will confer validity to the evaluation outcomes, which BFR training providers would then seek to adopt into their own programs in order to improve access to credit for BFRs that they train.

Accomplishments

Major goals of the project

Objective 1 is to assess and improve the quality and delivery of BFR financial and business literacy training programs through the establishment of a Community of Practice managed by the EIEIO project. Outcome 1. Create a Community of Practice among Southern region BFR Trainers, BFR Trainers from outside the South, key Farm Credit training staff, and EET Facilitators. Activity: Form an EET Facilitator team of five professional evaluators/facilitators who follow up with BFR Trainers in a long-distance consulting role, set expectations for networking among BFR Trainers across the range of BFR training programs that differ in farm-size scales, socio-economic levels, etc. Outcome 2. An inventory, evaluation, and assessment of financial and business literacy training components of BFR programs participating in the Community of Practice. Activity: Define evaluation resources and synthesize BFR training program evaluation tools for use by EET Facilitators Outcome 3. Identify best practices for training BFRs, tailored to audiences based on diversity of crop, region, limited resource, socially disadvantaged, and other characteristics. Activity: BFR training site visits made by EET Facilitators Activity: Conduct quarterly

sessions of facilitated closed webinars will feature presentations on unique BFR programs by the respective EET Facilitator and associated Trainers Activity: Create tools and checklists of financial skills that should be included in BFR programs, adjusted for differing BFR skill and education levels Outcome 4. A Trainers Resource Guide developed through the Community of Practice process that documents program assessments, best practices and learning. Outcome 5. Train-the-trainers workshops conducted on the use of an evaluation tool kit developed by EIEIO and used by BFR Trainers to assess improvement in their training programs that allows for measurement of success by methods appropriate to the programs complexity Outcome 6. Increased peer-to-peer training and capacity building opportunities for BFR programs. Activity: Develop plan for replication of CoP to use in other regions and report to Clearinghouse Objective II is to deepen collaboration among BFR financial and business literacy training programs, Farm Credit, and other agricultural organizations in the South. Outcome 7. Identification of gaps that exist in access to capital for BFRs across the entire spectrum of credit, from personal credit to microlending, bridge lending, and commercial credit. Outcome 8. New and enhanced relationships between leadership of the various training programs through the CoP that will extend well beyond the life of the grant and continue to build capacity that leads to more prepared beginning farmers and ranchers. Outcome 9. Greater BFR access to Farm Credit products and services through closer cooperation. Outcome 10. Outreach to BFR training conferences such as the Southern Sustainable Ag Working Group, Start2Farm, Young Farmers and Ranchers and links to the Curriculum and Training Clearinghouse.

What was accomplished under these goals?

Outcome 1: A Community of Practice (CoP) has been managed to increase participation and effectiveness for BFR trainers by allowing them to network with others in similar roles in the Southeast and around the US, including Farm Credit personnel. The EIEIO Community of Practice now has over 70 members across the U.S. (including 19 Colleges and Universities and 10 Farm Credit Association institutions). The CoP has continued to expand over the three years of the project and currently includes 34 BFRDP standard projects and 42 other farmer training-related organizations.

Outcome 2. The inventory, evaluation, and assessment of financial and business literacy training components of BFR programs participating in the CoP continued throughout the project as new BFRDP standard project trainers joined the CoP; the basis for the Trainer's Resource Guide (TRG) www.farmbiztrainer.com. EIEIO developed a set of pre-training, post-training, and 6-month follow-on surveys for use by trainers. These (Financial Assessment Survey Tools - FAST Surveys) are used by trainers either online or as printable paper copies. The EIEIO team continually encourages new projects to use the FAST Survey tools from the start.

Outcome 3. Best practices for training BFRs have been identified through dialog with trainers at the workshops and in site visits when Standard-project evaluation or training is conducted. This includes preferred training curricula identified by the EET team, which are incorporated into the Trainer's Resource Guide website. The TRG has resources tailored to audiences based on diversity of crop, region, limited resource, socially disadvantaged, and other characteristics. The TRG also contains tools and checklists of financial skills that should be included in BFR programs, adjusted for differing BFR skill and education levels.

Outcome 4. The TRG includes best practices, case studies and success stories from BFRDP trainers in the CoP. Resources include teaching methods, identifying trainees, training, mentoring, evaluation, funding for trainers, and funding for trainees. The TRG went live April 2013 and is focused on Financial Literacy and Business Planning Training. The website is connected with the Farm Credit, Start2Farm.gov and the Foodshedguide.org websites. The TRG currently contains over 70 resources.

Outcome 5. Train-the-trainers workshops included introduction to and use of the FAST Survey evaluation tool kit used by BFR Trainers to assess improvement in their training programs.

a. Presentation at NIFA BFRDP at the 2013 NIFA BFRDP Project Directors meeting in McAllen, TX in two separate sessions dealing with "Effective Financial Skills Training and Assessment to Improve BFR Training" and "Financial Management Resources and Education". These two presentations were well attended. A USDA Senior staff member in attendance was so impressed by the material and concepts that a briefing was scheduled with the Deputy Secretary of Agriculture.

b. CoP Workshops at the SSAWG Conferences in January of 2013 and 2014. This "Bootcamp for Financial Training" was focused on developing business and risk management plans. The resource providers discussed the ways in which risk management could be used. By the 2014 workshop the TRG had become a commonly used resource by the CoP.

c. "Budgeting for Grassfed Success" at Grassfed Exchange Conference in Bismarck, ND: This workshop took the EIEIO's past workshop principles a step further by introducing the new tool of the "One Page Cash Flow Budget", a new curriculum and related live/downloadable spreadsheet available on the TRG website.

A second workshop at the Grassfed Exchange Conference in July 2014 was "Budgeting for Grassfed Success: Real Life Numbers". Over 170 participated in the workshop including trainers, extension educators, and farmers/ranchers from over half the states in the nation.

d. A workshop on "Business Planning and Financial Management" at the August 2014 Federation of Southern Cooperative annual conference in Epes, AL. focused on assisting African American farmers. Partners in this conference included the Alabama Sustainable Ag Network, and the Mississippi Sustainable Ag Network, bringing additional attendees to the event to benefit from the training.

Outcome 6. The EIEIO team committed to develop a plan for replication of the CoP to use in other regions. In 2013, we opened up the CoP to trainers nationally, so that by August 2014 there were over 70 members. In keeping with the USDA's

desire to quickly improve BFRDP training in the finance and business areas we deemed this action to be appropriate and reported the same as an outcome in year 2.

Outcome 7. Discussions in the CoP reveal that the gaps that do exist in access to capital for BFRs are most often tied to lack of a business plan and poor personal credit ratings. A bi-monthly newsletter was sent out to the EIEIO listserv providing updates on the previous workshops as well as upcoming events. Starting in September 2013 and through the end of year three, the EIEIO Team began including a section titled "Into the Trove", in which there included overviews of one or two specific resources from the Trainers Resource Guide.

Outcome 8. The EIEIO team built BFR Trainers' capacity and best provided services to them through face-to-face workshops (see Outcome 5, above), webinars, conference calls, and the web-based Trainer's Resource Guide. By year three many of the trainers involved in the CoP required more complex tools and more intensive in-person workshops to better assist their training development and delivery.

In November 2013 the EIEIO team did a webinar on our FAST Survey tools. <http://www.ngfn.org/resources/ngfn-cluster-calls/assessment-tools-for-improving-farmer-financial-skills>

BFRDP projects have shown a strong interest in serving the growing number of women and military veterans interested in farming and ranching. In year-3 of the project we began to engage veteran organization including the Farmer Veteran Coalition (FVC) as their reach has gone national.

Outcome 9. CoP members are very interested in stronger connections with the local Farm Credit Associations. Farm Credit brings financial skills training delivery to many BFRDP grantees' classrooms at no cost. In addition to providing training, relationships are developed with BFR trainees so that not only access to credit but institutional strength is established that will last beyond the project period.

Promotion of the Trainer's Resource Guide has been done by Farm Credit and was also a featured webinar on the Wallace Center's National Good Food Network Webinar series.

Outcome 10. EIEIO training sessions were held at conferences such as the Southern Sustainable Ag Working Group, EcoFarm, the Federation of Southern Cooperatives, the Northern Michigan Small Farms Conference, and Farm Bureau Young Farmers and Ranchers.

An example of a year 3 workshop is the CoP Regional Workshop: "Growing Cash Flow: A Simple Tool for Budgeting and Managing Cash Evaluation" with the Virginia Beginning Farmer & Rancher Coalition Program in Syria, VA July 2014. Fifteen trainers and resource included providers from Farm Credit and FSA. The workshop had 15 people participate, all trainers of farmers, or leads of a BFR trainer program.

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

The entire focus of the EIEIO project is the training and professional development of BFRDP standard project grantee trainer staff. Two webinars were held with the CoP members only, and four others were conducted with the Wallace Center's National Good Food Network, which invited both CoP members and others. The first CoP webinar Featuring Miriam Pflug of AgSouth Farm Credit built on the success of the first EIEIO CoP wide conference call. The webinar was held on Wednesday, June 12th 2013 from 3:00 - 4:00 PM ET. The webinar presentation reviewed how four entities combined forces to accomplish their common training goals through open communications, collaboration, and a shared vision. The partners shared their SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis of a successful partnership. This webinar showed the attendees that even when one individual has a great idea, there are often additional resources that can help you accomplish your training goals. A recording of the webinar is available on the EIEIO website.

The second CoP webinar featured Kim Niewolny of Virginia Tech. It was held on Wednesday, July 10, 2013 from 3:00 - 4:00 PM ET. As Beginning farmer training and program development grows at a teeming rate across the United States, educational programs include everything from short-term workshops, hands-on courses, distance learning, and apprenticeship models that comprise a range of experiential, community-based, and peer learning opportunities. This webinar presentation illustrated the place-based innovation of the Virginia Beginning Farmer and Rancher Coalition Program, a 2010 USDA BFRDP recipient. The presentation emphasized how Kim's team utilizes a community-based participatory research (CBPR) approach whereby a state-wide coalition of service providers and farmers are together developing and implementing whole farm planning programs, 3 farm mentor networks, and several online learning and networking opportunities. A recording of the webinar is available on the EIEIO website. This webinar specifically addresses Outcome 6: To build increased peer-to-peer training and capacity building opportunities for BFR programs. This EIEIO team training session deepened collaboration among BFR financial and business literacy training programs, Farm Credit, and the other agricultural organizations that participated.

A CoP Workshop in Statesville, NC, hosted at Carolina Farm Credit Offices, was held in mid- October 2012. The event was specifically requested by members of the CoP to be held in the eastern part of the Southeast - for ease of travel (since the first project wide workshop was held in Little Rock, AR - the west end of the region) in January 2012. Twenty-five CoP participants attended this workshop, with the majority coming from the nearby states such as Virginia, Tennessee, North Carolina, and South Carolina.

This EIEIO workshop was conducted as a successful story presentation from four separate BFRDP trainers who gave a narrative of what is working, what hasn't worked, and what they're doing to improve their training program. EIEIO project priorities for year two were discussed with the group, giving time for feedback to ensure the project team's goals were in line

with the goals of the CoP. The evaluation results from this workshop confirmed our initial thoughts that the CoP attendees received a great deal of value from attending, and requested once again more access to resources and resource providers through the EIEIO CoP. Elements of this workshop have been repeated at two other Farm Credit Associations (Farm Credit of the Virginias and First South Farm Credit in Mississippi).

By moving our workshops around the Southeast the EIEIO team could effectively engage more BFRDP standard project trainers and Farm Credit Associations, thus fostering new relationships that resulted in improved training as the BFRDP trainers began to invite Farm Credit loan officers to bring their real-world business and lending experience into the training, better equipping the trainees for success. In our training we emphasize that rarely is an individual trainer of farmers/ranchers knowledgeable in all three key elements - production, marketing, finance - of an enterprise. If they required training support in finance, Farm Credit is pleased to bring its expertise in support of that training. This has been well received and often taken advantage of.

The EIEIO project was also successful in fostering new and enhanced relationships between leadership of the various BFRDP standard training programs through the CoP. These relationships (i.e., with Farm Credit or FSA) are expected to extend well beyond the life of the grant and continue to build training capacity that leads to more financially literate and business-savvy beginning farmers and ranchers. The EIEIO Project Team determined that sharing what the facilitators learned from their visits with BFRDP standard project trainers was extremely valuable to other BFR trainers - so we developed a "Success Stories" section in the TRG. This positive information sharing with the CoP is as a way to show trainers how others have succeeded based on relationship building, collaboration, and resource sharing. This further supports Outcome 8 (above).

Below are some examples of facilitator updates on how they fostered partnerships and training resource sharing to strengthen training program:

- Tom Welsh, South Carolina: facilitated the partnership between Clemson University and AgSouth Farm Credit to connect Clemson to resources and resources providers during and beyond the grant period.
- Jim Lukens, Arkansas: Invited members of SSAWG to the pre-conference EIEIO Boot Camp Workshop with the SSAWG Conference - which receives over 1,000 attendees annually.
- Andrew Williams, Alabama: Connected some local farmers through Tuskegee University with Alabama AgCredit to partner together on a presentation at a mini conference with the theme, "Saving Rural America", bringing to the even the importance of financial and business planning to the event theme.
- Allen Williams, Mississippi: Is facilitating the EIEIO workshops at the national Grassfed Exchange conference in 2013 (North Dakota) and 2014 (Missouri). Many BFR and trainers/educators attend the Exchange and the workshop on financial and business literacy conducted were well attended and well received.

How have the results been disseminated to communities of interest?

Direct communications to CoP members about these events (see various in the outcomes, above) and resources (primarily those included in the TRG) were made available through a bi-monthly newsletter. It is sent out to the EIEIO listserv providing updates on the previous workshops as well as upcoming events. The newsletter was also shared with Start2Farm.gov and USDA-NIFA, which also distributed them to their broader BFRDP audiences and beyond. Starting in September 2013, we began including a section titled "Into the Trove", in which we included two specific resources from the Trainers Resource Guide. We gave a short description, what type of farmer or trainer it is targeted to help, as well as the Facilitator to contact with any questions. The listserv and CoP extends beyond BFRDP standard projects, including Farm Credit staff as well as extension educators and others from around the nations.

This featured resource idea has been very successful in giving the CoP information on important topics without them having to search for the material. In addition, it's a subtle way to advertise the Trainers Resource Guide and provide a mechanism for those on our list serv to check out the website if they had not visited yet. Promotion of the Trainer's Resource Guide has been done through Farm Credit communications networks. The TRG was also a featured webinar on the Wallace Center's National Good Food Network Webinar series.

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

Nothing to Report. This is the final report of the EIEIO project. NOTE: The EIEIO Project team has submitted a 2014 BFRDP EET project proposal to extend this work nationally and add in additional focus on building enterprise resiliency into the business and finance training of farmers/ranchers. In addition, the Farm Credit Council has agreed to fund the core operations of the EIEIO team for one year from its own funds in the event that the 2014 BFRDP application is denied. This demonstrates the commitment of the EIEIO team and Farm Credit

Participants

{Nothing to report}

Target Audience

The target audience for his project (EIEIO) concentrates first on USDA-BFRDP standard projects in the Southern region (Southeastern US); second, expanding the participation by opening up the Community of Practice (CoP) to any USDA-BFRDP standard project nationally; third, further expanding participation in the COP to any BFR farmer training program whether or not they are a BFRDP grantee that has an interest in financial skills training (NOTE: this third audience was added to the project's target audience as knowledge of the COP spread throughout the network of programs training BFRs in financial skills. Also, in the third year of the grant there were no new BFRDP Standard grantees due to the Farm Bill not being passed) ; and fourth, directly assisting all USDA-BFRDP projects attending NIFA's required annual PD meetings by offering workshops at that meeting and offering technical assistance to improve their financial skills training capacity (NOTE: this fourth audience was added to the project's target audience after a constructive and well-received presentation by the EIEIO PI/PD at the first of the annual NIFA PD meetings that the EIEIO team attended. Following that first meeting, the EIEIO team presented train-the-trainer financial skills workshops at NIFA required annual PD meetings for the subsequent two years of the grant period).

As an EET, the project goal is focused on review of BFR training programs rather than direct training of BFRs. In the second and third year of this project, additional BFR training programs were chosen to join the EIEIO CoP because they comprehend the benefit of having outside evaluation, peer-to-peer networking, and development of training materials to suit their needs. The staff of BFR training programs have participated in order to develop a long term relationships with trusted and experienced farm business lenders such as Farm Credit that will increase the potential for access to credit for trained BFRs.

The EIEIO team has engaged BFRDP programs that have clearly addressed the target audiences of limited resource farmers and ranchers; socially disadvantaged beginning farmers or ranchers, immigrant farm workers planning to become beginning farmers or ranchers; and /or other farm workers desiring to become beginning farmers or ranchers. Since an EET project serves the needs of BFR training programs as opposed to BFRs themselves, we have relied on the stated outreach goals of BFRDP programs that they will serve such farmers and ranchers.

Products

Type	Status	Year Published	NIFA Support Acknowledged
Websites	Published	2013	YES

Citation

www.farmbiztrainer.com

Other Products

Product Type

Educational Aids or Curricula

Description

Description

1. The Trainer's Resource Guide is a database of EIEIO Team-vetted BFR training curricula. It was created to highlight best practices in financial skills training materials created by BFRDP projects and others.

www.farmbiztrainer.com

2. A suite of 3 FAST Surveys for use by BFRDP grantees or other BFR trainers called: Financial Assessment Survey Tools. These survey tools are available as downloadable PDF print surveys or through an online portal supported by Iowa State University, where survey information can be anonymously aggregated and used for further research in determining financial skills training effectiveness.

The EIEIO team has developed this set of customized Financial Assessment Survey Tools (FAST) to use in financial literacy and business planning training. The guide (provided on www.farmbiztrainer.com) walks BFR trainers through how to use the surveys in their training programs. There are three surveys in the set:

- Pre-survey to use with trainees before the training program

- Post-survey to use at the end of the training
- Follow-up survey to use six months after completion of the training

3. A Customization Guide for Trainers was created using past self-evaluations given out to the Community of Practice members who are BFR trainers. The tool helps BFR Trainers understand how well developed their current program is and what might be the appropriate financial skills training tools their BFR students may require at this stage of their education. It has turned out to be a valuable metric for both sides of the relationship.

4. A suite of One-Page Planning documents was developed in partnership with Farm Credit Association staff. This includes a One-Page Business Plan, the One-Page Financial Plan, and the One-Page Risk Management Plan. These became a prime resource that has been leveraged widely in BFRDP standard projects interested in sound yet simple tools to introduce key finance and business planning to BFR trainees. The suite is posted and available in the TRG as well as directly to farmers at www.foodshedguide.org/planning, along with a one-hour webinar to explain these resources and how to use them effectively.

Changes/Problems

Because there were no new BFRDP grant awards made in 2013, the EIEIO project did not have a new cohort of grantees to assist. The EIEIO team re-directed its efforts to providing more detailed technical assistance to BFR trainers in regional meetings that were held in 2014. The flexibility of the CoP has allowed the EIEIO team to continue to assist BFR trainers in the manner envisioned by this project. Specific outcomes as a result of these changes such a conferences, webinars and meetings are reported in the Outcomes section.