

# **BUSINESS PLANNING FOR FARM SUCCESS: A Gathering of Farm Viability Professionals**

**June 30<sup>th</sup> & July 1<sup>st</sup>, 2008**

## **AGENDA**

### **Monday, June 30**

<b>8:30 am</b>	<b>Registration</b>
<b>9:00 am</b>	<b>Welcomes</b>
<b>9:30-11:30 am</b>	<b>Plenary Session</b>
<b>11:45 am</b>	<b>Lunch (Served in the Lobby)</b>
<b>1:00-2:30 pm</b>	<b>Workshop Session #1</b>
<b>3:00-4:30 pm</b>	<b>Workshop Session #2</b>
<b>6:00-8:00 pm</b>	<b>Dinner at Tully &amp; Marie's Restaurant, overlooking the Otter Creek</b> Walking directions from Middlebury Inn to the restaurant are provided in your packet.

### **Tuesday, July 1**

<b>8:00 am</b>	<b>Registration</b>
<b>8:30-10:00 am</b>	<b>Workshop Session #3</b>
<b>10:00-2:45 pm</b>	<b>Farm Tours (Buses depart promptly at 10:15, lunch provided en route)</b>
<b>3:00-4:00 pm</b>	<b>Workshop Session #4</b>
<b>4:00-5:00 pm</b>	<b>Reception</b>

## **CONFERENCE TRACKS**

### **A. Program Development Track**

Relationships between Business Planning and Farmland Protection Programs (1-A)

Sustainable Funding for Farm Viability Programs: Public and Private Funding, the Farm Bill and Other Opportunities (2-A)

Applying Farm Viability to Ag-Related Businesses: Supporting Agriculture through Infrastructure (3-A)

What Does It Cost? Comparing State Programs' Expenditures and Intended Results (4-A)

### **B. Directors & Coordinators Track**

The Value of Team-Based Methods for Delivering Business Planning Services (1-B)

Recruiting and Training TA Providers (2-B)

Evaluating Programs: the Process and Indicators Used to Measure Farm Viability (3-B)

Meeting Multiple Farm Needs through Business Planning (4-B)

### **C. Service Providers Track**

Identifying New Markets and Expanding Existing Markets through Market Research (1-C)

Comparing Financial Planning Tools (2-C)

Farm Transition, Farmland Access and Innovative Succession Models in Business Planning (3-C)

Utilizing Farmer Mentors (4-C)

## **MONDAY**

### **WELCOME, 9:00 AM**

**Gus Seelig, Executive Director, Vermont Housing & Conservation Board**

**Roger Allbee, Vermont Secretary of Agriculture**

### **PLENARY SESSION, 9:30-11:30 AM**

#### **Contrasting Business Planning Program Models**

Program directors will speak about their programs, sharing program models with the audience to set the stage for the conference. Topics covered may include: models for administration and delivery; partner organizations and service providers; timetables for business planning; farmer recruitment, eligibility, applications and the enrollment process; advisory boards; kinds of plans produced and types of technical assistance provided.

### **WORKSHOP SESSION #1, 1:00-2:30 PM**

#### **A. Relationships between Business Planning and Farmland Protection Programs (Founders Room)**

How have different states developed various farmland protection and farm viability programs? Did they evolve at the same time, or in response to particular funding sources? This session will explore the different models, program partners, and how these two kinds of programs may be coordinated, intertwined, or co-located. Panelists will explain how their programs were initially designed and why, and there will be ample time for discussion and questions.

*Panel:*

*Cris Coffin, American Farmland Trust, MA*  
*Nancy Everhart, Vermont Housing & Conservation Board, VT*  
*David Haight, American Farmland Trust, NY*  
*Jay Healy, Working Landscapes, MA*

## **B. The Value of Team-Based Methods for Delivering Business Planning Services (Willard Room)**

Some business planning programs provide a single consultant or farm business educator to work with a farmer or farm family to develop a business plan. Other programs utilize more of a team approach to business planning. Some state programs develop advisory teams to address management and production issues on the farm. Usually called Management Team or Profit Team programs, they meet on a regular basis and are primarily focused on the dairy industry. This session will address the benefits of using a team-based approach to on-farm planning and decision making, and how to incorporate team-based methods into existing programs.

*Panel:*                    *John Frey, Center for Dairy Excellence, PA*  
                                  *Travis Marcotte, Intervale Center, VT*  
                                  *David Weinand, Minnesota Department of Agriculture, MN*

## **C. Identifying New Markets and Expanding Existing Markets through Market Research (Stewart Library)**

Market research is key to improving the success of farm enterprises. Incorporating market research and identifying good marketing consultants benefits every business planning program. This session will utilize several panelists and engage the entire audience in a discussion of the role market research plays in business planning, available marketing tools, resources in the market research field, and how marketing consultants can engage farmers in the process.

*Panel:*                    *Jim Boylan, Mad River Research, VT*  
                                  *Rose Wilson, Business Development Services, VT*

## **WORKSHOP SESSION #2, 3:00-4:30 PM**

### **A. Sustainable Funding for Farm Viability Programs: Public and Private Funding, the Farm Bill and Other Opportunities (Founders Room)**

How are different business planning programs funded? Are there opportunities that we might collectively pursue through federal or private sources such as USDA grants or a large request to private foundations? What about opportunities for funding within the Farm Bill? How do different programs use state or private funds, and are they sustainable sources? Speakers will include people working at the federal and regional levels as well as from the private foundation perspective. The session will also address where one might look for start-up funds for new programs. There will be plenty of time for an open discussion and questions regarding funding sources.

*Panel:*                    *Jiff Martin, American Farmland Trust, CT*  
                                  *Tom Sleight, NY Farm Viability Institute, NY*  
                                  *Tim Storrow, Castanea Foundation, VT*  
                                  *Adrienne Wojciechowski, Office of VT Senator Patrick Leahy, DC*

### **B. Recruiting and Training TA Providers (Stewart Library)**

Finding qualified consultants and technical assistance providers with the broad range of skills necessary to help farm families develop business plans is not always an easy task. Recruiting providers is an ongoing process for many program administrators. Offering regular training

and networking sessions for providers can develop the skills of individual providers and keep everyone current on the latest trends and resources while also creating a robust network of providers and consultants who work collaboratively within and outside the program. Presenters will share their models for recruitment and training, along with manuals and other tools used to develop technical assistance skills. The second half of the session will be dedicated to questions and discussion.

*Panel:*                    *Ela Chapin, Vermont Farm Viability Enhancement Program, VT*  
*John Porter, University of New Hampshire, NH*  
*Craig Richov, MA Department of Agriculture, MA*

### **C. Comparing Financial Planning Tools (Willard Room)**

What financial planning tools are most helpful when looking at a farm business? Are there tools that you find particularly user friendly for farmers to use year after year? During this session several financial planning tools will be demonstrated. Conference participants will be able to share tools they find most useful and several farm financial experts will be on hand to discuss them in depth and respond to any questions that arise during the session.

*Facilitator:*            *Steve Paddock, VT Small Business Development Center, VT*

## **TUESDAY**

### **WORKSHOP SESSION #3, 8:30-10:00 AM**

#### **A. Applying Farm Viability to Ag-Related Businesses: Supporting Agriculture through Infrastructure (Founders Room)**

Farms rely on a variety of agricultural support businesses as well as an infrastructure of processing, marketing and distribution businesses. There are growing needs for such infrastructure in many states, and other states are at risk of losing theirs. How are various states supporting this infrastructure, and is business planning assistance a programmatic tool that may help? A panel will present current program development in this area and facilitate a discussion on this issue.

*Panel:*                    *Stacy Burnstein, Castanea Foundation, VT*  
*Steve Paddock, VT Small Business Development Center, VT*

#### **B. Evaluating Programs: the Process and Indicators Used to Measure Farm Viability (Stewart Library)**

Farm Viability – and the impact of business planning on a farm’s future – are not easy things to measure. There are quantitative financial measures that many people use, and yet much of the impact described by farmers relates to factors affecting quality of life such as the ability to take a vacation or to secure health insurance. How do we evaluate business planning programs? What indicators and other measures do people use? How do internal and external evaluations compare? This session will be led by several program administrators who have conducted evaluations of their programs both internally and externally. They will relate their experiences, answer questions and facilitate a discussion on how to frame the evaluation, the benefits of external evaluators, and what questions to ask.

*Facilitators: Craig Richov, Department of Agriculture, MA  
Kerri Sands, Farms for the Future, ME*

### **C. Farm Transition, Farmland Access and Innovative Succession Models in Business Planning (Willard Room)**

Farms will not remain viable without the next generation of business owners. Transitioning ownership is a critical and challenging process for many business owners, whether ownership is being handed down to the next generation, to a business partner, another farmer, or employees. This session will explore different ways that programs are assisting farmers in farm transition, including intergenerational transfer, tools for finding and selecting business partners, and farmland access programs.

*Panel: Kathy Ruhf, Land for Good, MA (Facilitator)  
Deb Heleba, University of Vermont Extension, VT  
Michael Lehan, Working Landscapes, MA  
Alex Wylie, Vermont Land Trust, VT*

## **FARM TOURS, 10:00 AM-2:45 PM**

**Please begin boarding buses in front of the Middlebury Inn at 10:00 am following Session #3 workshops. Buses will depart promptly at 10:15. Bathrooms are available on the bus. Please come with close-toed shoes and prepared to be outside for several hours.**

Each tour will visit three farms that have completed a business plan with the Vermont Farm Viability Program, and are diversifying their farm through value-added enterprises such as cheese, cider, poultry processing and compost.

Anyone who has been in contact with live chickens in the past 72 hours will be asked to go on the South Tour, to protect the flock at Misty Knoll Farm.

### **North Tour**

Misty Knoll Farm, New Haven  
Arcadia Brook Farm, North Ferrisburg  
Dancing Cow Farm, Bridport

### **South Tour**

Crawford Family Farm, Whiting  
Champlain Orchards, Shoreham  
Scholten Farm, Weybridge

See farm descriptions in your conference packet, or ask for one at the registration table!

## **WORKSHOP SESSION #4, 3:00-4:00 PM**

### **A. What Does It Cost? Comparing State Programs' Expenditures and Intended Results (Stewart Library)**

This session is an opportunity to hear and talk about the different expenditures related to administering a business planning program. What does your program pay for a consultant to complete a business plan with a farmer? Are the deliverables the same? Using a grid, we will compare and contrast information from various programs.

*Facilitator: Kerri Sands, Farms for the Future, ME*

### **B. Meeting Multiple Farm Needs through Business Planning (Stewart Library)**

Farms may set out to complete a business plan with your program, and then it becomes apparent that they also need other assistance. Perhaps the farm family is working on a farm transfer, or is considering a new enterprise. Perhaps they have a conflict within the family or partnership, or with a state or federal agency. Our programs frequently offer multiple services to farmers in addition to a basic business plan, ranging from technical assistance, legal advice, and in-depth marketing research to various levels of planning for particular enterprises, to assisting with federal grant applications! How do we ensure our programs are well designed to provide high quality services in such an array of areas? This session will provide time for a detailed discussion of how programs meet the wide range of services needed to support farm businesses.

*Facilitator: Jeff Perry, NY FarmNet, NY*

### **C. Utilizing Farmer Mentors (Founders Room)**

Farmers may be the best source for technical assistance in many situations. Finding those farmers that make good mentors, and offering them training on how to conduct farm visits may benefit many programs. Presenters will talk about how they identify, utilize and support farmer mentors in their programs, and what makes for a good farm visit. There will be ample time for discussion among audience members during the session.

*Panel: Ed Maltby, MA*

*Lisa McCrory, grazing consultant, VT*