



NATIONAL FARM VIABILITY CONFERENCE MIDDLEBURY, VERMONT

Thursday, September 26th, 2013

8:00-9:00 REGISTRATION

Location: Town Hall Theater - Main Lobby

9:00-10:00 CONFERENCE KICK-OFF

Location: Town Hall Theater - Main Hall

Welcome

Gus Seelig, Executive Director of the Vermont Housing & Conservation Board (VHCB)

Opening Speaker

Eleanor Léger, Eden Ice Cider Company, West Charleston, Vermont

Eleanor left a successful 20-year business career to start Eden Ice Cider Company with her husband Albert in April of 2007. Ice Cider is a sweet yet sophisticated dessert wine made from apples and concentrated by natural winter cold, developed in Southern Quebec over the past 10 years. Ice Cider takes advantage of the long, cold winters in this region and provides a significant value-added opportunity for the region's commercial apple orchards, which have been hurt in recent years by the flood of cheaper apples from West Coast and Chinese producers. In 2012, Eleanor and Albert spearheaded the development of the Northeast Kingdom Tasting Center in downtown Newport, Vermont, which opened its doors this summer. Eleanor earned a B.A. cum laude in Economics from Harvard and an M.B.A. with Distinction from The Wharton School.

www.edenicecider.com

Presentation: Who's Here?

Ela Chapin, Director of the Vermont Farm Viability Program

10:00-10:30 BREAK

10:30-12:00 SESSION 1

- An Introduction to Financing the Farm - Knowing the Options
This session will cover topics such as: Financing options (debt, sub debt, royalty and equity) and the benefits and tradeoffs of each; capital providers and expectations each have; and preparedness of the borrower.

Presenter: John Hamilton, New Hampshire Community Loan Fund
Town Hall Theater, Main Hall

- Helping Farms and Food Processors Overcome Common Marketing Challenges

Farms and food producers often make easily correctable marketing mistakes. This workshop will identify the most common problem areas and help business planners assist small farms and food producers with the following marketing challenges: branding, displays and visual merchandising, customer service and retention, websites, and social media.

Presenters: Myrna Greenfield, Good Egg Marketing; Rose Wilson, Rosalie Wilson Business Development Services
Middlebury Inn, Founders Room

➤ **Connecting Farm Viability Assistance and Land Conservation Programs**

Hear about programs in ME, MA and VT that combine technical assistance, business and succession planning, grant funding and land protection.

Facilitator: Nancy Everhart, Vermont Housing and Conservation Board

Panelists: Jon Ramsay, Vermont Land Trust; John Piotti, Maine Farmland Trust; Melissa Adams & Craig Richov, Massachusetts Department of Agriculture

Middlebury Inn, Willard Room

➤ **Benchmarks: Putting a Business in Context**

What business benchmarks can farmers and planners use to plan for and analyze their business? Hear from stakeholders that have expertise in various agriculture sectors to learn about the various production, finance or labor benchmarks that are observed in established businesses. Join the panel in identifying where more benchmarking is needed to support business management and communication with lenders and capital providers.

Presenters: Mark Cannella, University of Vermont Extension; Jean Conklin, Yankee Farm Credit; Richard Wiswall, Cate Farm - East Montpelier, VT
Town Hall Theater, Studio

12:00-12:45 LUNCH

Please return to the Middlebury Inn lobby to pick up boxed lunches. You will be able take your lunch on the farm tour of your choice, eat outside, or eat in the Middlebury Inn Founders Room.

12:45-5:30 FIELD TRIPS & SESSION 2

Field trips will be leaving ON TIME. The tour sizes are limited by bus capacity, and buses will be filled on a first-come, first-served basis.

Tour 2A and 2B will load at 12:45.

Tour 2C and 2D will load at 1:00.

➤ **2A FARM TOUR WORKSHOP: Profitability and Scale**

Bus loads at 12:45.

Vermont Smoke and Cure, Kimball Brook Farm bottling plant

This workshop will tour two food-manufacturing operations—Vermont Smoke & Cure and Kimball Brook Farm’s Green Mountain Organic Creamery – and use their recent experience in moving into a new facility as the backdrop to exploring the importance of and challenges to profitability in changing the scale of operations.

Workshop Leaders: John Ryan, Vermont Ag Development Program at the Vermont Sustainable Jobs Fund (VSJF); Janice St. Onge, VSJF Flexible Capital Fund

➤ **2B FARM TOUR WORKSHOP: Innovation and Sustainability in the Dairy Industry**

Bus loads at 12:45.

This workshop will include a visit first to the well-known Foster Brothers Farm and their successful composting enterprise, Vermont Natural Ag Products, right here in Middlebury. Robert Foster will share the farm family’s story and talk about current opportunities and challenges in the compost industry. A second farm visit will be to the Hall Farm where father Louis Hall and daughter Jennifer Breen co-own and manage a 120 cow organic dairy farm. They have recently invested in robotic milking equipment and a green house barn to improve the viability of their farm. The session will conclude with a panel and discussion of other innovative programs to support the dairy industry.

Workshop leaders: Tony Kitsos, University of Vermont Extension; David Weinand, MN Dept of Agriculture

➤ **2C FARM TOUR WORKSHOP: Social Sustainability on the Farm -- Looking Beyond Profitability to Build a Truly Sustainable Farm Business**

Bus loads at 1:00.

Elmer Farm, Scholten Family Farm, Lincoln Peak Vineyard

While profitability remains the focus of any business planning process, it is important to integrate other personal, family, community and farm goals to maintain a truly sustainable business. On this tour, sponsored by the Vermont SARE program, we will visit three farms--Elmer Farm (a diversified horticulture operation), Scholten Family Farm (an organic dairy), and Lincoln Peak Vineyard (a winery using the farm's cold-climate grapes). We will explore how entrepreneurship, farm succession, quality of life, social integration, and equity issues play major roles in the ongoing viability of these and other family farms. Our farm hosts will introduce their farm businesses and discuss how these aspects have impacted their operations.

Workshop leaders: Deb Heleba, UVM Extension/Vermont SARE Coordinator; Sam Smith, Intervale Center

➤ **2D FARM TOUR WORKSHOP: Developing Critical Agricultural Infrastructure & Adding Value to Commodity Products**

Bus loads at 1:00.

Champlain Orchards, Vermont Refrigerated Storage

Visit Champlain Orchards and Vermont Refrigerated Storage in Shoreham, Vermont. Hear the details of businesses that play critical roles in Vermont’s agricultural infrastructure, expanding markets and creating new opportunities for producers around the region. We will also discuss capital planning, direct delivery, minimal processing and leasing storage space, among other topics.

Workshop leader: Chelsea Lewis, Vermont Agency of Agriculture, Food, and Markets

6:00-8:00 DINNER AT MIDDLEBURY TOWN HALL THEATER

Dinner will be held in the Main Hall of the historic Town Hall Theater, and will feature local veggies and meat! There will be vegetarian, vegan, and gluten free choices. It will be a casual buffet, with plenty of time for networking and dessert!

Friday, September 27th, 2013

8:00-8:30 REGISTRATION

8:30-10:00 SESSION 3

➤ Information Management & Sales Tools

There are an increasing number of information management systems becoming available to organize farm production, transactions with buyers and managing customers. This session will showcase newly available software platforms from Centerpoint, Local Orbit and others.

Facilitator: Mark Cannella, UVM Extension

Presenters: Erika Block, Local Orbit; Nick Bullock, Yankee Farm Credit; Giulia Stellari, Ag Squared

➤ How Food Hubs Enhance Farm Viability - Successes & Challenges

Many farmers and ranchers, especially smaller operations, are challenged by the lack of distribution and processing infrastructure of appropriate scale that would give them wider access to retail, institutional, and commercial foodservice markets. Regional food hubs make it possible for producers to gain entry into new and additional markets that would be difficult or impossible to access on their own. Today well over 9,000 producers are marketing their products through more than 230 food hubs. A growing body of evidence suggests that these new market opportunities created through food hubs have enhanced small farm viability, but questions and challenges still remain. Hear from national experts, and a local food hub manager, and discuss the opportunities emerging and the challenges faced by food hubs working to increase the viability and well-being of small farm operations.

Presenters: Jeff Farbman, Wallace Center; Ann Karlen, Fair Food Philadelphia; Sona Desai, Intervale Center; Jean Hamilton, Black River Produce

➤ An Overview of Transfer & Succession Planning

An overview of issues that need to be addressed in supporting a family farm through the transfer of assets to heirs and the handover of managerial responsibilities to successor(s).

Presenter: Mike Sciabarrasi, University of New Hampshire

➤ The Addressable Market & Planning Growth

How does an entrepreneur size their segment of the market in a \$1.7 trillion food industry? How do they best create a plan to double growth? We continue to hear about the growing demand for local food in the U.S. through the news media, industry analysts and conferences such as this one. But for people starting or building a food enterprise, how might they develop a quantitative estimate that realistically

represents their particular opportunity? And how exactly are they going to generate sales to meet those projections? In this session learn about tools you can use to help producers identify and quantify their addressable market, build a sales plan to hit their projections, and talk about it persuasively.

Presenters: Kathy Nyquist, New Venture Advisors; Malini Ram, Wholesome Wave Investments

➤ **Innovative Financing Mechanisms & Tenure Models for Gaining Access to Land**

Panel discussion about innovative tenure models and financing mechanisms focused on helping farmers gain access to land, such as multiple owners/operators, long term leases, investor financing and other models. Case studies presented by farmers.

Facilitator: Nancy Everhart, Vermont Housing and Conservation Board

Panelists: Kathy Ruhf, Land For Good; Brad Leibov, Liberty Prairie Foundation; Hannah Noel, Sawyer Bay Farm – Grand Isle, VT; Jim Oldham, Equity Trust; Mimi Arnstein, Wellspring Farm - Marshfield, VT

10:00-10:30 BREAK

10:30-12:00 SESSION 4

➤ **Farm Viability Program Directors' Roundtable**

Program directors and managers from different states will share how their programs have developed over time; their methods of delivering business planning services; evaluation metrics; and trends in enrollment and need for services. All directors and managers invited to attend and bring questions for your peers! After initial sharing from various programs, there will be time for a facilitated discussion. Those new to or interested in initiating business planning programs for farm and food businesses are invited to listen in.

Facilitator: Julia Shanks, Julia Shanks Food Consulting

➤ **Roundtable - Trends in Farm and Value-Added Agricultural Finance**

What are the current challenges and opportunities facing the food financing system? Listen and interact with a panel of experts from across the capital continuum talk about trends and current issues. Bring your own comments and questions!

Facilitator: John Hamilton, New Hampshire Community Loan Fund

Presenters: Janice St. Onge, VSJF Flexible Capital Fund; Bonnie Rukin, Slow Money Maine; George Putnam, Yankee Farm Credit; Elizabeth Ü, Financing for Food; Dorn Cox, Green Start

➤ **Recordkeeping and Tax Preparation - What's in Your Financial Toolbox?**

Recordkeeping is critical to understanding your business, having the information you need to make decisions, planning for and preparing taxes and informing financial statements and projections. Hear from Yankee Farm Credit specialists, small business advisors and consultants on record-keeping best practices and tools available.

Presenters: Steve Paddock, VT Small Business Development Center; Nick Bullock, Yankee Farm Credit; Lori Shaw, CYA Solutions

- **Critical Things to Know about Human Resources for Farms and Agricultural Businesses**
Panel discussion of topics such as: advising farmers that are hiring their first employees; outreach assistance on compliance with federal labor rules; finding and retaining critical hires; legal use of interns and apprentices on farms; differentiating between agricultural and value-added production work.
 Facilitator: Tom Berry, Senator Leahy's office
 Presenters: Jim Mooney, Northeast Regional Enforcement Coordinator, US Department of Labor; Stephen Monahan, VT Department of Labor; Kenneth Miller, Law for Food; Deb Eibner, VT Small Business Development Center

- **Engaging the Public on Working Farms: Successes and Challenges of Agritourism**
Farm stands, farm stays, school tours, and festivals are all forms of agritourism, one of the fastest growing segments of agricultural direct marketing. Agritourism allows farmers to diversify their core operations and keep farmland in production while supplementing their income and maintaining farming traditions. By providing authentic farm experiences for visitors, agritourism helps educate the public about the importance of agriculture to a community's economic base, history, and culture. Agritourism is growing rapidly throughout the US. However, the industry remains underdeveloped in many states, lacking technical assistance support, infrastructure, and networking opportunities to ensure best practices. At this workshop, farms profiting from agritourism and service providers who support these farms will share successes, lessons learned, and best practices for using agritourism to improve farm viability.
 Presenters: Lisa Chase, UVM Extension; Vera Simon-Nobes, Shelburne Farms & the Vermont Farms Association; Mari Omland, Green Mountain Girls Farm - Randolph, VT; Don and Judy Leab, Ioka Farm - Hancock, MA

12:00-1:15 LUNCH

A buffet lunch will be served in the Middlebury Inn Founders Room. For those attending a roundtable discussion, lunch will be provided on-site. Please head straight to your roundtable location!

- **Roundtable discussion: Finding and Managing Quality Consultants and Technical Assistance Networks**
Learn about several programs' methods of recruiting, training and supporting personnel and consultants that provide business planning and technical assistance to farm and food businesses. Share methods and learn about upcoming professional development opportunities in the northeast and beyond.
 Facilitator: Ela Chapin, Vermont Farm Viability Program

- **Roundtable discussion: Technological Challenges & Solutions for Food Businesses**
 Hear regional leaders' perspectives on areas of technological challenge and solutions that impact farm viability *including past experiences and thoughts about the future.*
 Facilitator: Chris Callahan, University of Vermont Extension
 Panelists: Robin Morris, Mad River Food Hub; Roger Rainville, Borderview Farm - Alburgh, VT; Jack Manix, Walker Farm - Dummerston, VT

1:30-3:00 SESSION 5

- Roundtable Discussion: Managing Marketing and Website Projects and Consultants
What do you look for in a marketing consultant? How best can we integrate marketing and business planning projects and timelines? Are there tips you can share about how to keep a website project in line with business needs and budget? Hear ideas from marketing professionals and viability program managers about managing marketing planning and implementation projects, and participate in a facilitated discussion on tricks, tools and things to consider when managing these projects with clients.
Facilitator: Charlene Andersen, New Hampshire Community Loan Fund
Presenters: Patrick Ripley, VT Small Business Development Center; Myrna Greenfield, Good Egg Marketing; Tom Elliott, ElliottRand Marketing & Communications

- How Do Deals Get Structured?
How a company may use a variety of deal structures at various stages of business; layering together different types of capital. Stakeholders describe representative deals and share their story and lessons learned.
Facilitator: John Hamilton, New Hampshire Community Loan Fund
Presenters: Dorn Cox, Green Start; Andrea Stanley, Valley Malt - Hadley, MA

- Selling to Institutions: The economic opportunities and pitfalls of the growing demand for Farm to Cafeteria products
More and more hospitals, colleges, schools, and other institutional kitchens are seeking out local products for their meal programs. What are successful ways (direct and wholesale) that farmers are supplying these cafeterias? How viable is this market? Hear from a host of New England Farm to Institution practitioners and farmers working out the kinks of supplying to these markets, doing much needed research, and working to find the economies of scale for this work.
Presenter: Kelly Erwin, Farm to Institution New England; Stacia Clinton, Health Care Without Harm; Abbie Nelson, NOFA-Vermont and VT Food Education Every Day (VT FEED)

- Working Through Complexity in Farm Transitions and Transfers
Modern farm business transitions often involve significant complexity around management transfer, family relations, financial, legal and tax issues, with many stakeholders and advisers. Good communication and coordination and a team approach is essential. After a brief overview of the issues and tools and resources, we will look at examples, including Matthews Family Farm. During the remainder of the workshop attendees will work together on farm transition scenarios in small groups. Audience members are encouraged to bring resource materials to share, and to submit scenarios for consideration prior to the workshop. To submit tools/resources or scenarios, please email Mike Ghia at mike@landforgood.org.
Presenters: Mike Ghia, Land For Good; Mike Sciabarrasi, University of New Hampshire;
Allen Matthews, Matthews Family Farm - Pennsylvania

3:00-4:00 CLOSING AND ICE CREAM PARTY

Relax, mingle, and celebrate with Kingdom Creamery of Vermont ice cream! Kingdom Creamery is a family owned dairy farm, specializing in delicious yoghurt and ice cream. The Michaud family has produced milk on their family run farm in the Northeast Kingdom of Vermont for three generations, and began making ice cream and yogurt in 2011.