

# TRAINERS' RESOURCE GUIDE

*Adding financial skills to your farmer training.*

## An EIEIO Community of Practice “Toolbox” Business Planning & Finance Literacy Training Resources

Michigan Food Hub Network Webinar--- March 20, 2014

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EIEIO Project Partner, TRG Lead



# Context: The EIEIO Project

## Evaluating and Improving Educational Instruments and Outreach (EIEIO)

– The project partners came together around a recognized ***need for improved finance and business planning training*** - to help beginning farmers and ranchers succeed.

- Developed in part with USDA NIFA BFRDP funds through a grant to the Farm Credit Council ([www.fccouncil.com](http://www.fccouncil.com)) and its EIEIO Project Partners

- To truly prosper in a thriving, sustainable venture, a farmer needs to plan the enterprise and pay attention to its finances. That's where this guide *and you—as a trainer of beginning farmers and ranchers*—can help build financial skills necessary for success.



**Focus:**

- Financial Skills/Literacy
- Business Planning

**Format:**

- Web-based
- access via computer/tablet/smart-phone

**Friendly:**

- Accessible by trainers & farmers/ranchers

# Community of Practice

The Community of Practice (CoP) networks BFR trainers from around the nation and connects them with business and financial literacy experts who bring added knowledge and experience to [Beginning Farmer and Rancher Development Program](#) training.

Participants can share best practices, identify obstacles, and test new approaches in a supportive, facilitated environment. This website is a collection of their shared learnings.

The map below depicts the trainer locations of CoP members throughout the United States. Choose any of the colored markers on the map below for details about a member, or view [a complete list](#).

## Join the CoP!

The Community of Practices welcomes new members interested in advancing financial and business training for farmers. Please contact the EIEIO team if you are interested in joining and being added to our listserve.

Join



# Screen Shot

Resources ▾ Community of Practice ▾ About ▾ How to Use Contact

## TRAINERS' RESOURCE GUIDE

*Adding financial skills to your farmer training.*

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### About the Guide

The Trainers' Resource Guide was created for those who train beginning farmers and ranchers (BFRs). The typical training program usually has a good foundation in farm production skills, but overlooks financial literacy and business planning skills. This guide will help you add these vital skills to your training program, leading to sustainable success for your trainees' ventures.

The guide is a compliment to a [Community of Practice](#) established with the [project partners](#) to network BFR trainers for sharing experiences and successes, learning from each other, and together strengthening financial and business training.



Financial and business skills are critically important to new farm enterprises and the expected farm management and land ownership transition nationwide that will happen over the next several years in our rural communities. While intended for trainers, the guide may also be of value to enterprising beginning farmers and ranchers searching for specific educational tools for self-improvement. We also encourage beginning farmers and ranchers to visit the [Start2Farm](#) website, which is geared specifically for them.

#### Explore Resources

- [How to Train](#)
- [Identifying Trainees](#)
- [Curricula](#)
- [Mentoring](#)
- [Evaluation](#)
- [Funding for Trainers](#)
- [Funding for Trainees](#)

#### Suggest a Resource

If you know of a training resource we should include, please [let us know](#).

food systems for a health

# Trainers Resource Guide – Resources

## Resources

This section is the heart of the guide. It's where you can find material for use in beginning farmer and rancher finance skills and business training.

Training is most effective when it meets the needs of the trainee and is taught in an engaging way. The Trainers' Resource Guide will help you do just that. This guide is a curated collection of financial literacy and business planning resources for trainers of beginning farmers and ranchers. The EIEIO project compiled these resources from the [Community of Practice](#) and other sources. (Learn [more](#).)

This guide provides a solid starting point for trainers interested in leveraging existing resources for the benefit and success of their BFR trainees. You'll find resources on the following topics:

- [How to Train](#)
- [Identifying Trainees](#)
- [Curricula](#)
- [Mentoring](#)
- [Evaluation](#)
- [Funding for Trainers](#)
- [Funding for Trainees](#)

### Search Resources

Resource Topic

Knowledge Level of Trainee

Trainee Audience

Farm Type

Resource Format

Search

[About the Search tool](#)

### Suggest a Resource

If you know of a training resource we should include, please [let us know](#).

- **Resource Categories**

- How to Train
- Identifying Trainees
- Curricula (training resources)
- Mentoring
- Evaluation
- Funding for Trainers
- Funding for Trainees

*and*

- Links to trainers and other experts around the nation

### **Fully searchable**

*“The TRG website is very easy and intuitive to navigate...”*, Jon N.

**Expanding...we add new resources regularly**

# Trainers Resource Guide – How to Use

## How to Use this Site

Training is most effective when it meets the needs of the trainee and is taught in an engaging way. To help you achieve these goals, this site offers links to a broad set of training materials from expert trainers nationwide as well as access to a network of trainers. We encourage you to connect directly to other trainers and learn from their experience with their programs. Doing so will make your program even stronger.

### Suggest a Resource

If you know of a training resource we should include, please [let us know](#).

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## Resources

The heart of the Trainers' Resource Guide is a carefully selected collection of [resources](#) for trainers of beginning farmers and ranchers. View the [full list of resources](#), or narrow down the list with our handy search feature.

## Network

While this collection is helpful as a stand-alone resource, the [trainer-to-trainer networking](#) may well prove to be as or more valuable. Successful training is often about the nuance of delivery and learning how the tools can be used most effectively. Tapping into trainers who have successfully used the resources can be invaluable.





# Trainers Resource Guide – Contact

## Contact

The EIEIO Project Team wants to engage you to help strengthen your beginning farmer and rancher training.

.....

If you would like to know more about the EIEIO project or the Trainers' Resource Guide please contact any of the project team members:

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(616) 581-1360

Learn more about our [Project Partners](#) and our [Community of Practice members](#).

**Suggest a Resource**  
If you know of a training resource we should include, please [let us know](#).

# Financial Assessment Survey Tools - *FAST*

- Category
  - Mentoring & Evaluation
- Target
  - All BFRs
- Description
  - Pre, Post and Follow-Up Surveys
  - Summary of the farmers in your class
  - Post-training analysis is focused on how effective your methods were at reaching audience

# Financial Assessment Survey Tools - *FAST*

- Ready-to-use surveys
- Useful for **measuring**:
  - Effectiveness
  - Trainee progress
  - Tailoring training
  - Gaps to address

*and*

- Guiding your training program **development** for robustness
- *“teach to the test”*

## BFRDP Financial Literacy and Business Planning Project Financial Assessment Survey Tools

The EIEIO team has developed this set of customized Financial Assessment Survey Tools (FAST) to use in your financial literacy and business planning training. This [guide](#) will walk you through how to use the surveys in your training program. There are three surveys in the set:

- [Pre-survey](#) to use with your trainees before your training program
- [Post-survey](#) to use at the end of the training
- [Follow-up survey](#) to use six months after completion of the training

While we recommend using the electronic versions of the survey (links above), should your training program have participants that cannot access the internet, printable PDFs of the survey are available for your use. Be sure to follow the [guide](#) instructions for of the printed surveys.

- [Pre survey](#) printable PDF
- [Post survey](#) printable PDF
- [Follow-up survey](#) printable PDF

Category: Evaluation; Mentoring

Level: Beginning, Intermediate, Advanced, General

Target Audience: Ethnic/Minority, Latino, Women

Farm Type: Beef; Commodity Row Crops; Pasture Dairy; Poultry, Swine, Small Livestock; Produce

Format: Tool

[View](#)

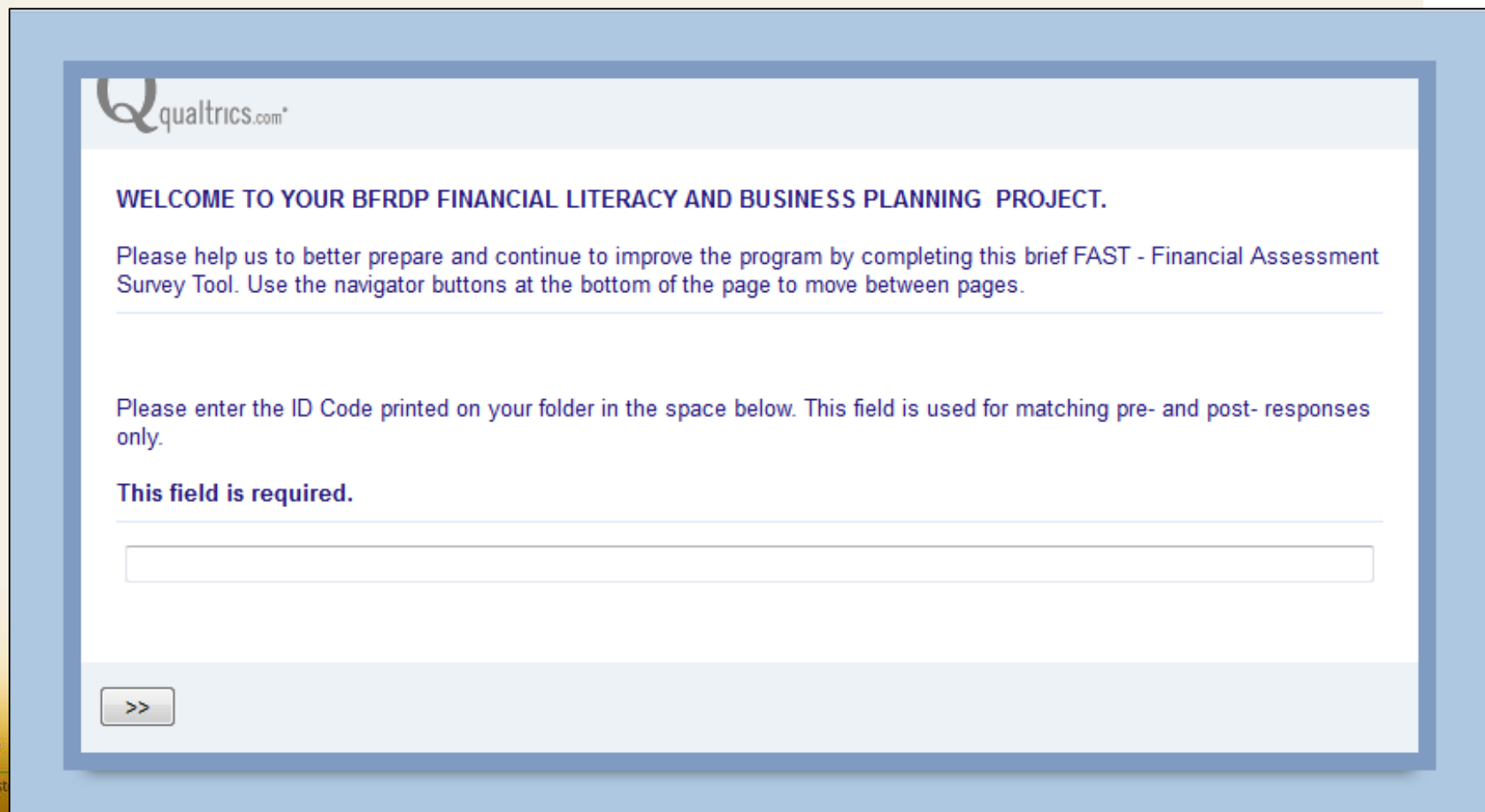


food systems for a healthier world



# Financial Assessment Survey Tools

**2 Formats:** *On-line or as a printable PDF*



The screenshot shows a survey interface with a light blue header containing the Qualtrics logo and the text "qualtrics.com". Below the header, the main content area is white and contains the following text:

**WELCOME TO YOUR BFRDP FINANCIAL LITERACY AND BUSINESS PLANNING PROJECT.**

Please help us to better prepare and continue to improve the program by completing this brief FAST - Financial Assessment Survey Tool. Use the navigator buttons at the bottom of the page to move between pages.

---

Please enter the ID Code printed on your folder in the space below. This field is used for matching pre- and post- responses only.

**This field is required.**

At the bottom left of the form, there is a grey button with the text ">>" inside it.

The screenshot shows the homepage of start2farm.gov. At the top, there is a navigation bar with 'Home | Start 2 Farm Extranet' and a search box labeled 'search for keywords'. A yellow circular callout on the left says 'START HERE' with 'START2FARM.GOV' below it. An orange speech bubble callout says '...and now a word from our sponsors!!'. The main content area features a 'Spotlight' section with a photo of a man, a 'THINKING ABOUT FARMING?' section with a 'let's get started' button, and a 'PERSONALIZE YOUR SEARCH' section with buttons for 'Education and Training' and 'Finance'. A green callout at the bottom says 'ALREADY FARMING?'. The browser address bar shows 'http://start2farm.gov/categories'.

**If you want access to resources, then share your resources**





# “Into the Trove”

Featured Resource

- In the EIEIO e-Newsletter
- Brief Overviews
- Link to the resource
- Link to EIEIO Facilitator

**THE FARM CREDIT COUNCIL**

**WALLACE CENTER**  
WINROCK INTERNATIONAL

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**Into the Trove**

**Trainers Resource Guide**

The Trainers' Resource Guide was created for those who train beginning farmers and ranchers (BFRs). We have over [two dozen highest-quality curricula](#) and tools to assist your efforts. This e-mail is an introduction to two that might be relevant to your work. As part of the community of practice you will receive periodic emails like this to surface a few of the gems in the trove, along with the expert who can assist you in incorporating the resource into your program. Find them all, and other BFR trainer resources at <http://farmbiztrainer.com>

[Forward to a Friend](#)

**Upcoming Events**

**JOIN US for these upcoming BFRDP EIEIO Community of Practice Events!**

Please bring others on your team and your farmers to attend any of the following webinars, workshops and conferences\*\*. Any questions contact Chad at [chad@morseconnections.com](mailto:chad@morseconnections.com).

# “Into the Trove” Featured Resource- *example*

## Beginning Farmer, Business Planning, Marketing, and Sheep, Goats and Poultry Resources

Target Audience: All BFRs

Value Statement: Many beginning farmers get excited about owning and operating a farm, but they may not think about it first as a business. This program provides a facilitated process to help them to understand the steps that need to be taken to encourage success.

Description: This course provides step by step opportunities for a beginning farmer to learn what he or she needs to do to start a farm business. It challenges you to understand why you are in business and allows space for partners or family members to share their vision and goals for the farm as well.

Connect to the Resource at <https://attra.ncat.org/oasdf/>

Have more Questions?

Contact EIEIO Facilitator Andrew Williams

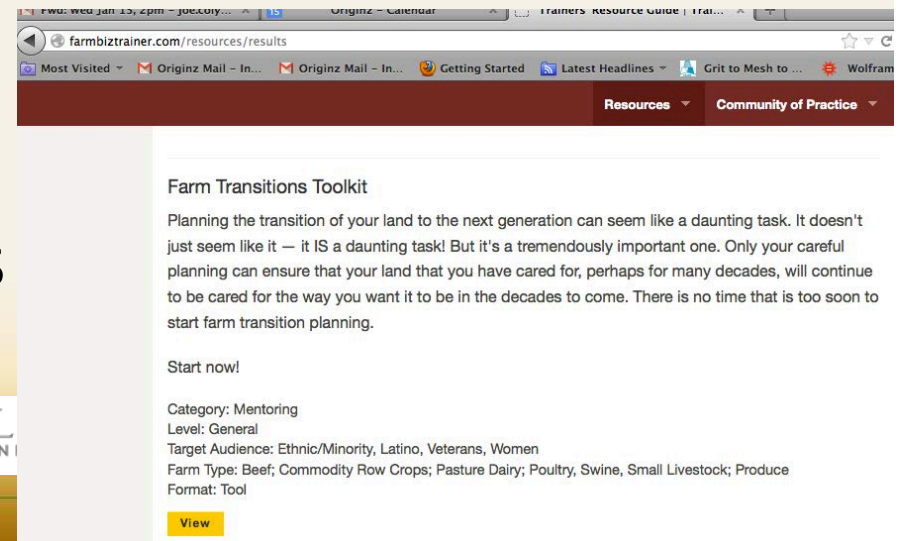
[andrewwilliams66@yahoo.com](mailto:andrewwilliams66@yahoo.com) 334-216-1344



# Farm Transitions Toolkit

Farmer  
Friendly  
Resource

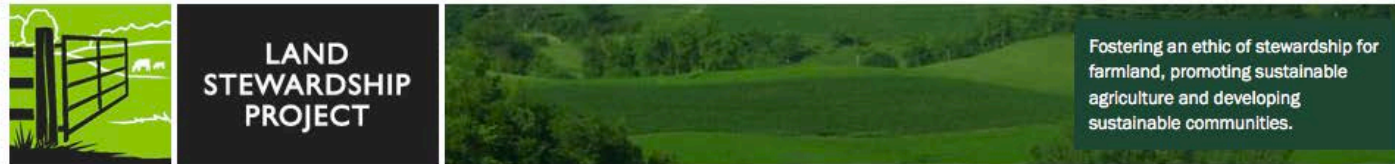
- Transitioning farm land/business to the next generation
  - Communicating with your family / heirs
  - Financial Record – valuation
  - Learn about options
  - Network – to professional resources: for assistance
- On-line
- By the NCAT and partners



The screenshot shows a web browser window displaying the 'Farm Transitions Toolkit' page. The browser's address bar shows 'farmbiztrainer.com/resources/results'. The page has a dark red header with 'Resources' and 'Community of Practice' dropdown menus. The main content area features the title 'Farm Transitions Toolkit' followed by a paragraph: 'Planning the transition of your land to the next generation can seem like a daunting task. It doesn't just seem like it — it IS a daunting task! But it's a tremendously important one. Only your careful planning can ensure that your land that you have cared for, perhaps for many decades, will continue to be cared for the way you want it to be in the decades to come. There is no time that is too soon to start farm transition planning.' Below this is a 'Start now!' section, followed by metadata: 'Category: Mentoring', 'Level: General', 'Target Audience: Ethnic/Minority, Latino, Veterans, Women', 'Farm Type: Beef; Commodity Row Crops; Pasture Dairy; Poultry, Swine, Small Livestock; Produce', and 'Format: Tool'. A yellow 'View' button is at the bottom.







- More Farmers on the Land
- What is Farm Beginnings?
- Where Do I Start?
- Farm Dreams Workshops
- Field Days, Tours & Workshops
- Farm Beginnings Course
  - Farm Beginnings in Other Regions: FB Collaborative
  - Farm Beginnings Collaborative Purpose & Guiding Principles
- LSP Farmer Network
  - LSP Journeyman Farm Training Course
  - Farm Beginnings Matched Savings Account
- Seeking Farmers-Seeking Land Clearinghouse
- Meet Our Graduates
- Resources for Beginning Farmers
- Farm Transitions Toolkit

## Farm Transitions Toolkit

### Welcome to the Farm Transitions Toolkit!

Planning the transition of your land to the next generation can seem like a daunting task.

It doesn't just seem like it – it IS a daunting task!

But it's a tremendously important one.

Only your careful planning can ensure that your land that you have cared for, perhaps for many decades, will continue to be cared for the way you want it to be in the decades to come.

There is no time that is too soon to start farm transition planning.

Start now!

### Who Starts the Farm Transitions Process?

- Farmer
- Landowner
- Spouse
- Child or Heir
- Farm Adviser

### Family Conversation Topics

- Where will you live?
- Where will the new farmers live?
- How much money do you need?
- [More conversation topics ....](#)

### Family Goals

Provide for family needs



TRAINERS' RESOURCE GUIDE

- **Education's Purpose is to Replace An Empty Mind With An Open One**

- Malcolm Forbes

- The TRG – a resource for educating the next generation of farmers and ranchers...

- ...so they can apply the knowledge and wisdom in creating thriving agri-food enterprises

Thank You!

The **TRAINERS' RESOURCE GUIDE** is at

[www.farmbiztrainer.com](http://www.farmbiztrainer.com)

Contact the EIEIO Project Team:

via the website links

via the facilitators

Joe Colyn – [joe.colyn@originz.com](mailto:joe.colyn@originz.com) 616 581 1360



TRAINERS'  
RESOURCE  
GUIDE

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# U.P. Food Exchange



## A partnership between



## With support from



# Regional Food Hubs

## Western Food Hub

Coordinated by Western U.P. Health Department



Aggregation Site To Be Determined

## Central Food Hub

Coordinated by Marquette Food Co-op



Aggregation Site Marquette Food Co-op

## Eastern Food Hub

Coordinated by Michigan State University Extension



Aggregation Site Harmony Health Foods

**U.P. FOOD**  
**EXCHANGE**  
growing local food systems

906.225.0671 x11  
[www.upfoodexchange.com](http://www.upfoodexchange.com)

# Role of Food Hubs in Food Safety

Food Hubs become the logical entities to bridge the food safety “GAP” because of their relationship with both farmers and buyers. In order for food hubs to succeed in aggregating and distributing source-identified food from very small to mid sized farms, helping farmers navigate the changing world of food safety is going to be necessary.

Initiative is doing the right thing without being told. –Victor Hugo

# Why Farm Food Safety?

- Protect public health
- Maintain confidence in our food supply
- Protect farm business/farm property/farm reputation and farm family
- May be required by risk managers, insurance companies, FSMA and buyers
- Quality control and safety are expected costs of doing business in other industries

You can't afford not to practice food safety-your farm business depends on it

# Food Safety Oversight from Two Fronts

- Food Safety Modernization Act (FSMA)
- GAP (Good Agricultural Practice)



# Who Is Affected?

- EVERYONE!

- Those who wish to sell into the wholesale market, not those who sell direct to consumer or via Cottage Food—yet!

We need to create a culture of Food Safety with everyone from farm to fork playing a role!

# Barriers to Food Safety on the Farm

- Fear of the **UNKNOWN**
- Farmer mindset that such regulation is burdensome & unnecessary
- Certification costs
- Lack of outreach & education by regulating bodies

“Not responding is a response - we are equally responsible for what we don't do.”

— Jonathan Safran Foer

# Benefits of Food Safety on the Farm

- Piece of mind for everyone (farmers, buyers, consumers, insurance companies)
- Confidence in our food and food system
- Healthy people
- Access to new markets for farmers
- Enhances the image/perception of local and regional food
- Makes marketing of local and regional food easier

# U.P. Group GAP Pilot Study

This study will investigate a collective certification model called Group GAP, which could mitigate the documentation and financial burden on small diversified farms by sharing resources—and risk.

# Pilot Study Partners

- Marquette Food Co-op (MFC)
- United States Department of Agriculture Agricultural Marketing Service (USDA-AMS)
- Michigan Food & Farming Systems (MIFFS)
- MSU Extension (MSUE)
- Western U.P. Health Department (WUPHD)
- MSU Center for Regional Food Systems (CRFS)
- U.P. Food Exchange (UPFE)

# Study Overview

- 16 farms (2 Western U.P., 2 Eastern U.P., 12 Central U.P.)
- 19 Internal Inspectors (various partner agencies)
- Interest from Michigan Department of Agricultural & Rural Development (MDARD)
- Written case study will be available to everyone
- Workshop in late fall/early winter in Lower Peninsula to share results
- Group certification model will benefit farms of all sizes and growing practices

# Shifting Farmer Mindset

How to go from “I won’t do this” to “this is a good idea.”

- Understanding
- Patience
- Education
- Time

# Natasha Lantz

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Project Co-Lead, U.P. Food Exchange

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[www.upfoodexchange.com](http://www.upfoodexchange.com)

