

Results/Outcome Based Grant Making “Begin with the End in Mind”

The Extension Risk Management
Education Program
Investing in Improved Risk
Management



Our Mission

- To help Farm and Ranch Families Succeed
through Targeted Risk Management
Education



Extension Risk Management Education Program

University of Delaware – Northeast Region

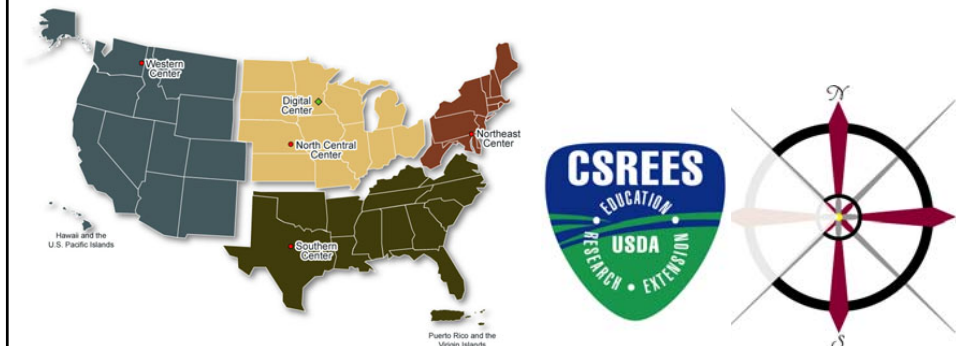
TexasAgriLife Extension – Southern Region

University of Nebraska - North Central Region

Washington State University Extension – Western Region

University of Minnesota – Digital Center

USDA, Cooperative State Research, Education, and Extension Service



Return on Investment

- The return on the investment of Extension Risk Management Education grant dollars we award are the *risk management improvements* that agricultural producers make because they participated in a project we supported.
- I.e., the risk management results/outcomes that agricultural producers achieve “are” the measure of success of any project we fund.

Process focused on Results/Outcomes

- The results based process, including the grant selection, reporting, and management system,
 - increases the probability that the programs we fund will in fact improve the risk management skills of the farmers and ranchers who participate,
 - is designed to improve, over time, the capacity and quality of the programs we fund, and
 - increases the opportunities to improve the risk management of the farm and ranch family participants.

Theory

- The theory behind the “Results Based” grant process is straight forward.
 - Improving the ability of agricultural produces to manage risk is the sole reason this program exists.
 - Base the grant award decision on whether the producer participants will achieve “risk management results” because they participated in the project.
 - Has the applicant made the case that producers who participate will make risk management gains because of the project.

Beyond Theory

- A “system” that adds value and keeps the focus on the risk management results for farm and ranch families.
- An online application, reporting, and verification process designed around risk management results.
- Always remember, at the core, it is about helping farm and ranch families improve their risk management.

Beginning with the “end” in mind!

- Begin with the end in mind
 - Determine **first** what the result/outcome is that the participants will achieve.
 - Design the program to lead the participants to those results/outcomes.
 - Do not wait till the end of the project to determine what the outcomes might be.
 - Begin and end the application and award process on whether producers will improve their ability to manage risk.

Keeping Producer “Results” at the Core

- A decision process that rewards applicants
 - who can clearly identify the risk management results the producers who participate will achieve, learn, or apply,
 - who can verify (measure) those results, and
 - whose applications convince the decision panel that the project they propose has a high probability that producers who participate will actually obtain the identified risk management results.

The On-line Application. . .

- Requires:
 - a clear identification of the risk management results the participants will achieve and how the project will deliver those results;
 - the applicant to identify how they will measure the “risk management results” the participants will achieve;
 - (A key to measuring any outcome is to figure out outcomes that are measureable, or some indicator of the outcome that is measurable.)

The Application also. . .

- Identifies:
 - why the farm and ranch family participants will “choose” to participate in the proposed program;
 - (Identifying the “prescribed need to know or do” is not enough. Producers must be willing to participate if they are to achieve the risk management results offered by the proposed project.)
 - “project steps” that give the panel reason to believe that the participants will make the risk management improvements proposed;
 - program resources including the team, collaborators, and “knowledgeable” presenters sufficient for the proposed results.

The Reporting System that . . .

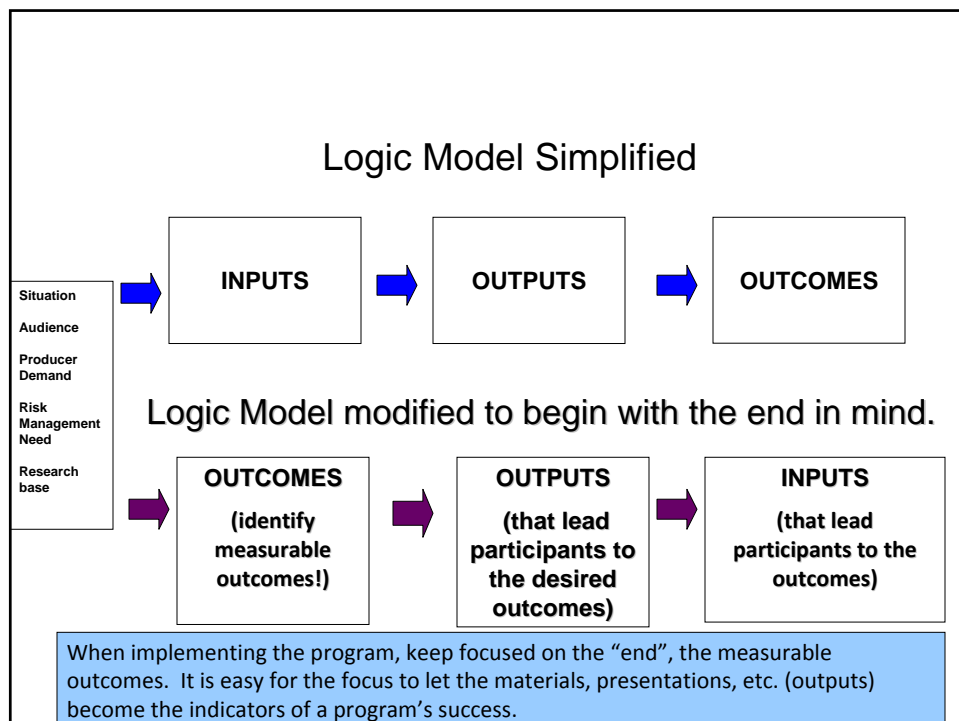
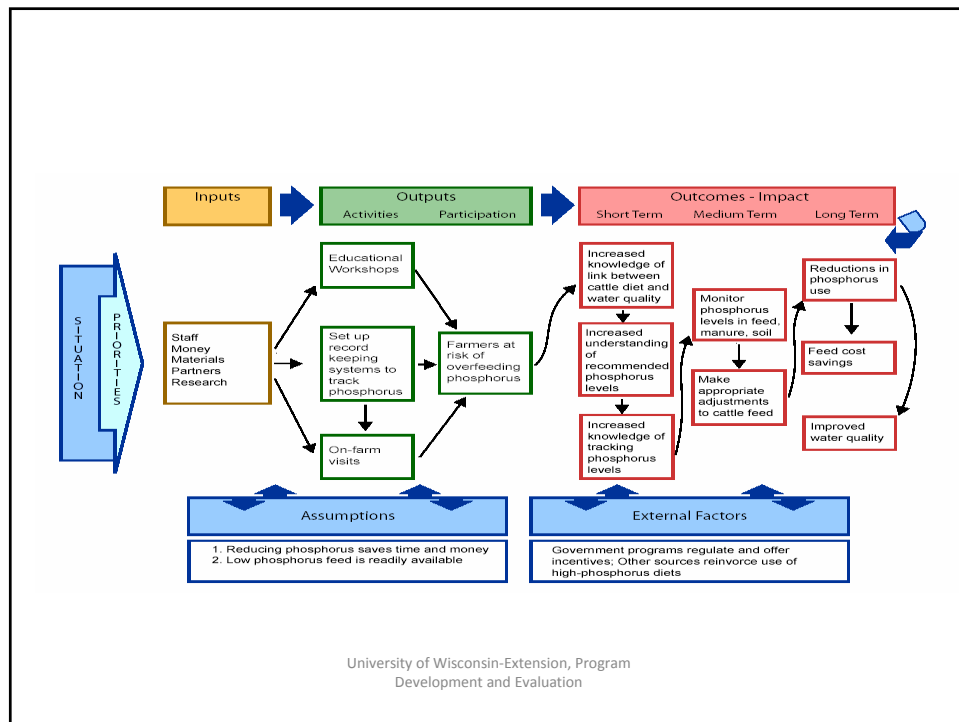
- helps keep the focus on results,
- eases the burden of reporting,
- creates transparency,
- improves accountability,
- provides incentives for applicants to deliver the results they proposed,
- makes all projects and project resources available for the world to review,
- keeps moving the bar higher for the effectiveness of risk management education.

Broader Lessons

- Beginning with the end in mind by identifying the desired measurable outcomes at the beginning of any project, is one of the keys to successful outcome based programming.
 - Yes there are often unexpected results and the verification process should make allowances to capture those results.

Consistent with the Logic Model

- Our results based process is a simpler, kinder, program model, AND it is completely consistent with the Logic Model.
- Take the outcomes/impact portion of the Logic Model and move it to the beginning of the process, or start at the end of the logic model and work backwards to the beginning of the Logic Model.
 - Keep one's focus on the outcomes and often assess whether progress towards those outcomes is being made.



Hierarchy of Results

- Our process includes a hierarchy of results that are constrained by
 - Twelve to eighteen month projects
 - Indicators that can lead to improved risk management which is the ultimate outcome we would hope to create but is difficult to determine within our project timeframe.
 - Accepted practice within extension farm management and marketing areas.

Hierarchy - weaker to stronger results

- Understand have improved understanding, of the issue, tool, or need to act.
- Decide to take an action. Make a commitment to write a marketing or risk management plan for instance.
- Develop something that improves their risk management: like a marketing plan; business plan; risk management plan; transition plan; etc.
- Implement or take an action that improves their ability to manage risk: implement the marketing plan for instance.

Trying to keep the applicant in mind too . .

- Using a 2 step application process and asking for the minimum information required to make an informed decision conserves the most precious resource the applicant and the panel have, their time.
- The application is short enough that all panel members can read each application.
 - improves the decision making process.
- The application is designed to provide the necessary information for the panel to make an informed judgment.



Other Benefits of the Application Design

- The on-line application design and the results-based process provides all individuals and organizations with good ideas and experience working with producers on risk management, but limited grant writing experience, an improved opportunity to be successful.

In Summary

- The results are the risk management strategies and/or tools that ag producers learn, achieve, or apply because they participate in the project that lead to improved risk management.
- The application must provide the information that will convince the selection panel that producers will choose to participate and that the project participants have a reasonable chance of learning, achieving, or applying the risk management tools or strategies being taught in the project so that they can improve their risk management.



Legislative title

Partnerships for risk management education:

- *Section 524 of the Federal Crop Insurance Act (7 U.S.C. 1524)*
- “(A) Authority: The Secretary, acting through the Cooperative State Research, Education, and Extension Service, shall establish a program under which competitive grants are made to qualified public and private entities . . .
- . . . for the purpose of educating agricultural producers about the full range of risk management activities, including futures, options, agricultural trade options, crop insurance, cash forward contracting, debt reduction, production diversification, farm resources risk reduction, and other risk management strategies.”

(Funding is provided from the Federal Crop Insurance Fund via a mandatory appropriation)



System Components

- Online proposal submission
- Online project reporting
 - Progress reports
 - Final reports
- Public display of project results in the Ag Risk Education Library

System Components

- Secure database archives all projects
- Administrative functions let staff track and manage reports and proposals

Extension Risk Management Education Results Verification System

"Investing in Results!"



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Western Center for Risk Management Education

Proposed Results - What Producers Will Learn, Achieve, Apply

Project Number: ApplicationRME

Instructions

	Proposed result that will happen by end of project	Topic	Producer action	When measured	Estimated number	How will you verify?
↓	Participants will indicate that they have an improved understanding of legal liabilities associated with direct marketing, farm labor/apprentices, developing value-added products, and on-farm events.	Labor regulations	Understand	End of first workshop	30	Written Evaluation
↓ ↑	Participants will indicate that they have an improved understanding of tools available to manage these farm legal liabilities.	Personal and business liability	Understand	End of first workshop	30	Written Evaluation
↓ ↑	Participants will commit to taking at least two actions to manage the legal liabilities related to the farm or ranch.	Personal and business liability	Decide	End of first workshop	25	Written Action Plan
↓ ↑	Participants will have utilized one or more tools to manage their farm or ranch-related legal liabilities.	Personal and business liability	Implement	March - April 2007	35	Phone Interview
↓ ↑	Participants will gain an improved understanding of how market assessment, feasibility studies and business planning can be used to decrease farm financial risk.	Business and strategic planning	Understand	End of second workshop	30	Written Evaluation
↓ ↑	Participants will commit to performing a market assessment, conducting a feasibility study or developing a business plan for a new farm or ranch enterprise.	Analysis of market fundamentals	Understand	End of second workshop	22	Written Evaluation
↓ ↑	Participants will have begun a market assessment or business plan.	Marketing plans and strategies	Decide	March - April 2007	15	Written Action Plan
↑	Participants will have conducted a market assessment, feasibility study or business plan.	Marketing plans and strategies	Develop	November 2007	25	Phone Interview

Add a new proposed result

Edit Proposed Result

Project Number: ApplicationRME

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Edit Proposed Result

Project Number: ApplicationRME

Instructions

Proposed result that will happen by end of project:

Participants will indicate that they have an improved understanding of legal liabilities associated with direct marketing, farm labor/apprentices, developing value-added products, and on-farm events.

Risk area:

Legal

Risk management topic:

Labor regulations

Producer action:
(Choose one)

☒ Understand - learn, increase awareness, identify
☐ Evaluate - analyze, investigate, assess, review, consider, explore
☐ Develop - write, conduct, obtain, create
☐ Decide - commit to, indicate, choose
☐ Implement - adopt, establish, incorporate, initiate, use

Estimated number:

30

When measured:

End of first workshop

How will you verify?

☒ Written Evaluation
☐ Phone Interview
☐ Personal Interview
☐ Pre/Post Assessment
☐ Online Evaluation
☐ Audience Response System
☐ Written Action Plan
☐ Assignment Completion
☐ Other

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Proposed Results - What Producers Will Learn, Achieve, Apply

[Instructions](#)

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↓	🌱	Participants will have utilized one or more tools to manage their farm or ranch-related legal liabilities.	Personal and business liability	Implement	March - April 2007	35	Phone Interview
↓	🌱	Participants will gain an improved understanding of how market assessment, feasibility studies and business planning can be used to decrease farm financial risk.	Business and strategic planning	Understand	End of second workshop	30	Written Evaluation
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↓	🌱	Participants will have begun a market assessment or business plan.	Marketing plans and strategies	Decide	March - April 2007	15	Written Action Plan
↑	🌱	Participants will have conducted a market assessment, feasibility study or business plan.	Marketing plans and strategies	Develop	November 2007	25	Phone Interview

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Results (Targets) - What Participants Learn, Achieve, Apply Instructions

Project Number: Final006

Results that will happen by end of project	Topic	Producer action	Estimated number	Actual number	How verified
Commit to completing a written succession plan.	Transition and estate planning	Evaluate	60	70	Signed Letter
Complete a written succession plan.	Transition and estate planning	Develop	45	35	Phone calls

Results that will happen after the project	Topic	Producer action	Estimated number	Actual number	How verified
Improved intergenerational communication.	Interpersonal, family and business relationships	Implement	40	65	Telephone survey
Implement a succession plan through at least one of the following: revised wills, business structure changes, agreement of all affected family members.	Transition and estate planning	Implement	35	30	Phone calls

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Project Comments Instructions

Project Number: Final006

Describe any unexpected results of the project:

There is more interest in this topic than we originally thought but it is more difficult to get participants all the way to implementing a succession plan. There was considerable drop-off after finishing the course. A higher than expected number of those who completed the course did not develop a timeline or schedule appointments. A positive feeling/evaluation of the workshop content did not translate into as much action as we had predicted.

Intergenerational communication improved in cases where no Succession Plan was prepared. Simply committing to do the Plan

How would you improve this project if you were to do it again?

In our after-project telephone survey, we asked participants what we could have done to improve the project. We also asked, of participants that did not reach the after-program target, what would have helped them do so. Participants stated that 1) they could have used more direct, one-on-one assistance, or 2) a phone reminder after the one-on-one assistance about what they stated they would do. We believe if more direct assistance had been provided to 1) those who completed the course but did not do a time line/schedule an appointment; 2) after the project to those who wrote their Plans to motivate and assist them with

What were the keys to success for your participants?

For those who did reach the target, success keys were: 1) they found the curriculum interesting and relevant to problems they were experiencing (we had phoned a sample of registrants and asked them what would be useful); then modified our draft curriculum accordingly; 2) the quality of the one-on-one assistance they received from the project attorneys. For those who reported improved intergenerational communication, regardless of whether they had implemented their succession plans, the key seemed to be

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Project Steps Instructions

Project Number: FinalRME

	D O N E	What Project Team Does	What Participants Do	Actual number	Date Measured
↓	<input checked="" type="checkbox"/>	Follow-up with those who request packet	Register for workshop	75	08/26/08
↓ ↑	<input type="checkbox"/>	Send out news releases; Give radio interviews; Do PSAs;	Request registration packet	165	12/17/05
↓ ↑	<input type="checkbox"/>	Conduct workshop	Complete workshop	65	
↓ ↑	<input type="checkbox"/>	Schedule appointments for 2 free sessions with attorney for individual consult	Develop timeline for completion of succession plan	55	
↑	<input type="checkbox"/>	Make reminder calls using schedule of appointments	Meet twice with attorney and finalize plan with accountant of their choice	45	

[Add a new project step](#)

↓ - Move project step down one position on the list
 ↑ - Move project step up one position on the list
 ✎ - Edit this project step
 🗑 - Delete this project step

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Featured Resource:
Ag in Uncertain Times webinar series
(06.15.2009)

Institution: Western Extension Committee
Publish Date: June 2009

Summary: Ag in Uncertain Times is designed to provide current information to farmers, ranchers and educators about the challenges in today's agricultural economy. The webinars and tools found here are some of the best currently available.

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Featured Project:
Farm Financial Analysis and Planning
(06.29.2009)

Project Director(s): Tom Platt
Institution: Washington State University
Funding Awarded: 2006

This project addresses production and financial risks.

Twenty five farmers and ranchers in Eastern Washington performed a comprehensive financial analysis of their operation to evaluate its financial position and unit cost of production. Two alternatives to their



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A Regional Women in Agriculture Program

Award Amount: \$29,441

Regional Center: Northeast Center for Risk Management Education

Project Director: Laurie Wolinski

Email: lw@udel.edu

University of Delaware Cooperative Extension

Advanced Training in Veterinary Skills and Animal First Aid

Award Amount: \$4,017

Regional Center: Northeast Center for Risk Management Education

Project Director: Janet Pfromm

Email: jps77@cornell.edu

Cornell Cooperative Extension of Chenango County

Advice from Farmers: Managing Human Risk for Maintaining and Sustaining Good Neighbor and Municipal Relations

Award Amount: \$15,000

Regional Center: Northeast Center for Risk Management Education

Project Director: David Kimmel

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Western Mass Wholesale Market Readiness Education

Award Amount: \$10,000

Regional Center: Northeast Center for Risk Management Education

Grant Program: 2007 Unrestricted Risk Management Education

Project Directors: Kelly Coleman

Email: kelly@buylocalfood.com

Community Involved in Sustaining Agriculture, Inc.

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Summary	Results	Project Steps	Materials	Delivery Area	Comments
PROJECT SUMMARY <p>This project addressed marketing and financial risks of western Massachusetts farmers by improving wholesale market readiness. The current supply of local farm products does not meet wholesale market demand in western Massachusetts and demand is growing. For example, 75% of 32 western Massachusetts institutional food service directors responding to a recent CISA survey said they were interested in increasing or starting to buy local food.</p> <p>The target audience for this project was western Massachusetts farmers interested in entering or expanding their participation in the wholesale market. While most of these farmers have developed multiple retail markets for their products, they have not fully explored, assessed and/or managed their risks in the wholesale market.</p> <p>NECRME funds supported the development and delivery of three workshops, 1:1 technical assistance to interested farmers and producers, and a web-based introduction to workshop topics. 34 farmers attended the workshops and 20 farmers received 1:1 follow-up.</p> <p>NUMBER OF PARTICIPANTS: 34</p> <p>TOPICS COVERED</p> <ul style="list-style-type: none"> Direct, wholesale, and processing markets 					

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Western Mass Wholesale Market Readiness Education

Award Amount: \$10,000
Regional Center: Northeast Center for Risk Management Education
Grant Program: 2007 Unrestricted Risk Management Education

Project Directors: Kelly Coleman
Email: kelly@buylocalfood.com
Community Involved in Sustaining Agriculture, Inc.

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Summary	Results	Project Steps	Materials	Delivery Area	Comments
Result(s) that will happen by end of project	Topic	Producer action	Proposed number	Actual number	How verified
Farmers will learn specific new skills for wholesale markets in three areas: building relationships, presentation and packaging, and financial record-keeping.	Marketing plans and strategies	Understand	30	34	workshop evaluation
Farmers will apply one or two new marketing risk management tools to their business.	Marketing plans and strategies	Implement	5	5	1:1 telephone survey
Farmers will apply one or two new financial risk management tools to their business.	Financial records and analysis	Implement	5	5	1:1 telephone survey
Farmers will generate new wholesale market accounts.			5	3	telephone and face to face check-ins

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Western Mass Wholesale Market Readiness Education

Award Amount: \$10,000
Regional Center: Northeast Center for Risk Management Education
Grant Program: 2007 Unrestricted Risk Management Education

Project Directors: Kelly Coleman
Email: kelly@buylocalfood.com
Community Involved in Sustaining Agriculture, Inc.

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Summary	Results	Project Steps	Materials	Delivery Area	Comments
What Project Team Did	What Participants Did	Number	Date Measured		
Finalize training schedule and list of trainers for workshops.	Not applicable.	0	November 30, 2007		
Design workshops, including training content, agenda, materials to be distributed, location.	Not applicable.	0	November 30, 2007		
Create and implement promotion plan to publicize workshops and technical assistance. Include target audience and media lists from all team members and collaborators.	Not applicable.	0	March 30, 2008		
Enroll participants in workshop series or individual workshops.	Enroll for workshop series.	34	March 30, 2008		
Prepare and conduct workshop series.	Participants will attend workshops and actively participate in the workshops.	34	March 30, 2008		

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Western Mass Wholesale Market Readiness Education

Award Amount: \$10,000
Regional Center: Northeast Center for Risk Management Education
Grant Program: 2007 Unrestricted Risk Management Education

Project Directors: Kelly Coleman
Email: kelly@buylocalfood.com
Community Involved in Sustaining Agriculture, Inc.

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Summary	Results	Project Steps	Materials	Delivery Area	Comments
			Promotional Materials	Educational Materials	Evaluations and Reports

Tools for Selling to Restaurants, Retailers and Institutions: Keys to a Successful Relationship

Claire Morenson
CISA (Community Involved in Sustaining Agriculture), June 2008, Material Type: Other (2 pages).

Selling directly to restaurants, retailers and institutions can be a great way for farmers to expand their businesses and develop a reliable customer base. This tip sheet is designed to provide farmers with tools to reach out to and build relationships with direct wholesale purchasers.

Material Uploaded to Ag Risk Library

Tools for Selling to Restaurants, Retailers and Institutions: Pricing and Invoicing

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Summary	Results	Project Steps	Materials	Delivery Area	Comments
DESCRIBE ANY UNEXPECTED RESULTS OF THE PROJECT: <p>The first workshop in the series, which featured a panel of local food purchasers and business owners talking about relationship-building, ended up functioning as a wonderful networking opportunity for the farmers and for the purchasers. This wasn't an entirely unexpected result, but we did hear about more connections that had been made as a result of the workshop than we had anticipated. Relying on people within our community to share their expertise helped foster the networking function of the event.</p> <p>Another unexpected result was the relevancy of the material to a wide range of market models. The workshop that focused on pricing, for example, provided farmers with tools to strengthen their direct retail markets in addition to building new wholesale relationships.</p> HOW WOULD YOU IMPROVE THE PROJECT IF YOU WERE TO DO IT AGAIN? <p>The critique we heard from participants was that they wished the workshops had been longer and that there had been more time during the question and answer period. The workshops began with dinner, so the presentations themselves were only an hour and a half. If we were to do this project again, we would provide more time for the panel discussion on relationship-building and divide the other two workshops up by topic. The workshop on pricing, invoicing, and record-keeping was especially dense and could easily have filled an entire morning workshop or been divided into multiple workshops.</p>					

Extension Risk Management Education Results Verification System

"Investing in Results!"



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"Results First" Program Planning

Dave Goeller
Deputy Director
North Central Risk Management Education Center

AAEA
Milwaukee, Wisconsin
July 26, 2009

UNIVERSITY OF
Nebraska
Lincoln

Farm Transfer & Estate Planning for Minnesota Farmers

Results that will happen by the end of the project

- Participants will state they better understand
 1. Intergenerational communication and goal setting
 2. Transfer concepts and strategies
 3. The importance of financial and tax planning
 4. Estate Planning strategies and the estate planning process
 5. The role life insurance, Power of Attorney and long term care planning have in the transfer and estate planning process



- | | |
|-------------------|--------------------|
| – Producer Action | Understand |
| – Proposed Number | 260 |
| – Actual Number | 284 |
| – How Verified | Session Evaluation |



Farm Transfer & Estate Planning for Minnesota Farmers

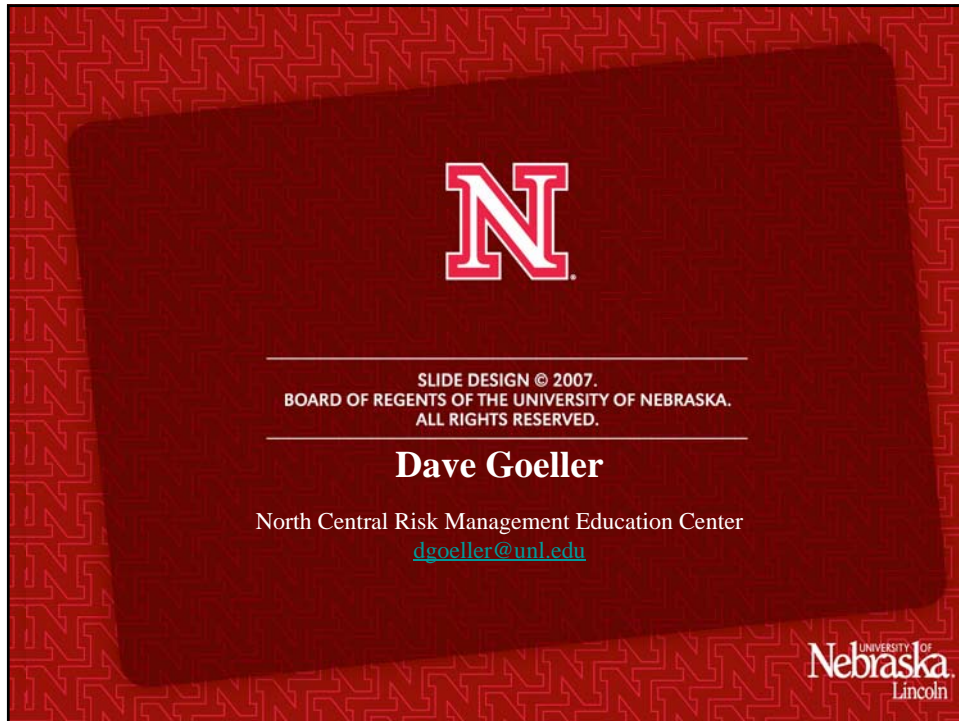
Results that will happen after the project

1. Participants will have completed & began the implementation of a farm transition plan
2. Participants will have completed & implemented an estate plan that compliments their farm transition plan.



- | | |
|-------------------|---------------------|
| – Producer Action | Implement & Develop |
| – Proposed Number | 80 |
| – Actual Number | 172 |
| – How Verified | Mail out Survey |





Western Mass Wholesale Market Readiness Education

Project Summary

"This project addresses marketing and financial risks of western Massachusetts farmers by improving wholesale market readiness. The current supply of local farm products does not meet wholesale market demand in western Massachusetts and demand is growing..."



Determine what the result/outcome is that the producer will achieve.

Beginning with the “end” in mind!

Western Mass Wholesale Market Readiness Education

Farmers will **learn** specific new skills for wholesale markets in three areas: building relationships, presentation and packaging, and financial record-keeping.”

Farmers will **generate** new wholesale market accounts.



Applicants must describe how the results will be verified.

Western Mass Wholesale Market Readiness Education

- Online survey
- Telephone survey
- End of workshop survey
- Individual follow-up phone calls
- Face to Face check-ins



Producer Demand

The Application also identifies why the participants will choose to participate

Western Mass Wholesale Market Readiness Education

“A **2006 survey** of CISA Local Hero member farmers indicates that **62% (39)** of those responding were interested in entering the **wholesale market**...These farmers are a likely audience for this project.”

“The **farmers who answered the survey identified finding and maintaining relationships with wholesale buyers** to be the biggest barrier to their participation in the market.”



Producer Demand

The Application also identifies why the participants will choose to participate

Western Mass Wholesale Market Readiness Education

“**1:1 work with a small number of farmers who are already participating in wholesale markets indicates that other significant barriers to success in wholesale markets exist.** These include the need for improved product packing, improved market analysis and pricing, and improved accounting and billing systems.”



Project Steps

The application also identifies how participants will make improvements

Western Mass Wholesale Market Readiness Education

What Project Team Does	What Participant Does
Prepare and conduct workshop series.	Participants will attend workshops and <u>actively participate</u> in the workshops.



Project Steps

The application also identifies how participants will make improvements

Western Mass Wholesale Market Readiness Education

What Project Team Does	What Participant Does
Provide workshop summaries and resource lists on CISA website. Publicize through newsletters and mailings to farmers.	Gain basic <u>understanding</u> of what additional information and skills they need to be successful in wholesale markets.



Project Steps

The application also identifies how participants will make improvements

Western Mass Wholesale Market Readiness Education

What Project Team Does	What Participant Does
Provide 1:1 follow-up support and technical assistance to farmers on marketing risk management tools.	Farmers will work with project team via face-to-face meetings, telephone, or email communications to <u>determine if and how to apply marketing risk management tools</u> to their business.



Project Steps

The application also identifies how participants will make improvements

Western Mass Wholesale Market Readiness Education

What Project Team Does	What Participant Does
Provide continued 1:1 technical assistance and follow-up support to project participants entering and expanding wholesale markets.	Use information <u>learned</u> and risk management practices <u>adopted</u> from participating in the project <u>to secure new wholesale market accounts successfully</u> .





Project Name/Number: Gaining New Ground: Arkansas Women in Agriculture Sub-State Regional Programming / RME-DPR02275

Project Summary:

Fifty women involved in row crop, livestock, poultry, fruit/vegetable and equine production attended (6 - 3 hr. or 2 – 8 hr.) workshops.

Topics included: risk management strategy, farm management, business planning, marketing planning and assessment, estate planning and transition, communication, financial record-keeping, women and money, retirement planning, crop insurance, health/life/disability insurance, internet resources/tools, and legal liabilities – all presented by highly qualified speakers.

Follow-up evaluations and assessment of changes were done via mail and e-mail.



Results – What Participants Learn, Achieve, Apply

Results	Topic	Producer Action
Attendees will improve marketing skills by understanding market analysis, outlook, and strategies.	Market Fundamentals	Understand
Attendees will execute new wills/trusts/estate plans.	Transition/Estate Planning	Implement
Attendees will gain a new understanding of financial records and analysis.	Financial Records and Analysis	Understand
Attendees will attain expertise in business plan development and execution.	Business and Strategic Planning	Understand
Attendees will develop and follow a marketing plan.	Marketing Plans and Strategies	Implement



Project Steps	Date
Project team meets with Annie's Project trainers to gather more information and materials.	Aug. 2007
Conduct meeting of PD and core collaborators to design all survey instruments, determine final educational materials, outlines, and schedule including locations.	Aug. 2007
Complete all training modules (financial management, marketing, and estate planning).	Aug. 2007
Design survey instruments and self-assessment checklist for estate planning.	Sept. 2007
Coordinate advertisement with media, site preparation and selection, copies of materials, outreach to former participants.	Sept. 2007
First Meeting held in Eastern AR beginning in Oct. 2007	Oct. 2007
Second Meeting held in Central AR beginning in Feb. 2008	Feb. 2008
Third Meeting held in Western AR beginning in July 2008	July 2008



Project Steps	Date
Project Team re-convenes to review evaluations, checklists, outcomes of all three meetings. Project team contacts all participants by e-mail to learn of intended uses of educational content.	July 2008
Project Team determines whether the project reached its goal of helping participants develop 30 new marketing plans.	July 2008
Project Team determines whether the project reached its goal of helping participants develop 30 new marketing plans.	July 2008
Evaluate project success post – meetings.	July 2008
Six months after the project is completed, the PD will re-contact all participants to gain update on marketing plan/business plan status and to update estate planning activities.	Jan. 2009



Examples of Project Success

90% of participants said they had made changes in their operations.

43% - Management Plan	38% Financial Record Keeping
52% - Communication Plan	14% - Insurance (health/life/disability)
24% - Business Plan	14% - Crop Insurance
38% - Estate Plan	29% - Marketing Strategies Used
24% - Retirement Plan	52% - Use of Internet Resources Highlighted

In addition:

71% indicated that their marketing skills had improved as a result of the program;

62% had executed or began to execute estate planning documents;

76% indicated that they had learned the importance of having a business plan;

95% indicated a better understanding of legal issues facing their operation;

57% said they had developed a marketing plan.