

**2014-2017 State Program Plan for
University of Vermont**



Project Title: Social Sustainability on the Farm

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2014-2017 Northeast SARE State Program Project Plan for: University of Vermont

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PROJECT TOPIC AND JUSTIFICATION OF TRAINING NEED

“Social sustainability” is generally defined as “the ability of a social system (in this case, a farm) to function at a defined level of social well-being indefinitely.” Farms face a myriad of social sustainability issues both internally (including health and wellbeing, human resource management, etc.) and externally (interaction with the community). How farm families identify, plan, and manage social sustainability on their farms has significant impacts on the viability of not only their own farming operations but of their communities as well. While every farm faces social issues at different phases of a) their business development and b) family life cycles, there are varying degrees of preparedness and/or “wellness” (including ability to cope and adapt) among farm families.

Helping farmers identify critical points in business development and family life cycles where particular social issues may likely arise is a first step in effective work in this area. Social issues in these 5 thematic areas will be considered in relation to farm business and family life cycles: farm succession, community connections, health and wellbeing, equity and entrepreneurship. Outfitting farm families with tools and support resources may help them recognize and plan for impacts on social sustainability when making business and/or production decisions. Further, steps to incorporate social sustainability indicators into Extension program evaluations may serve to elevate the importance of including social sustainability in sustainable agriculture research and education to achieve holistic programming.

Therefore, this project will build on initial efforts of our state programming (in current 2011-2014 project) by focusing on social sustainability issues that affect farm families. Based on state program evaluations, UVM Extension educators have increased their general knowledge about social sustainability and have started to make steps to integrate what they learned into their programming. Through personal interviews and a “dots survey” conducted in spring 2014, UVM Extension educators are especially interested in 1) gaining a better understanding of the roles that social sustainability plays in farm business and production planning, 2) helping farmers understand and cope with changes on their farms and in their families, and 3) measuring Extension programming impacts on farm social sustainability.

In January 2014, the Vermont Farm Viability Enhancement program conducted a survey of their farm business planners (additional target beneficiaries for this project) and found that their 19 respondents expressed interest in professional development training on quality of life factors (41%); human resources (39%), and farm succession (37%). These results indicate an interest in social sustainability beyond Extension.

5. BENEFICIARY AUDIENCE DESCRIPTION and RECRUITMENT EFFORTS

Beneficiaries

12 Extension ag educators and other service providers (i.e., farm business planners, and staff from non-profits and farmer organizations like NOFA-VT) will be recruited to participate in this project. They will be selected from a pool of the estimated 90 providers who work in Vermont with farmers.

Recruitment Efforts

- Notices about the project will be emailed directly to Extension educators and agricultural service providers.
- Individuals will commit to the project through an online form—the form will describe the project (including the performance target), learning objectives, and participant expectations.
- In year 2, implementation funds will be distributed to the 12 participants on an “as needed basis.” Here, participants will apply for funds for educational program expenses that advance the project’s learning outcomes and/or helping achieve the performance target. Commitment to the project goals and performance target, and agreement to complete a project evaluation and share their learning with other professionals will be further requirements of fund approval.

3. LEARNING OUTCOMES/CURRICULUM

Participants will increase their knowledge of and ability to address social sustainability in their sustainable agriculture research and education through:

- A farm diagnostic tool using the family development cycle and touchpoints of the 5 social sustainability themes.
- A farm diagnostic tool using the business cycle and touchpoints of the 5 social sustainability themes.
- 5 info sheets that provide descriptions and indicators of each of the social sustainability themes (farm succession, community connections, health & wellbeing, equity, and entrepreneurship).

Participants test diagnostic tools and info sheets in farmer programming (educational events, one-on-one consultations, etc.) by choosing at least one tool developed and apply it in ongoing or new programming. Participants evaluate use of the tools as well as develop indicators that can be used to measure education effects on farm family social sustainability.

Based on participant use and feedback, the tools are refined and published for wider use among other educators. In addition, a compiled set of social sustainability indicators Extension educators can use in their work.

4. EDUCATIONAL ACTIVITIES PLANNED

The following educational activities are planned:

- Ten webinar trainings over the course of the project (4 trainings in year 1, 2 in year 2, and 4 in year 3). Year 1 & 2 trainings will be conducted by “outside experts.” Year 3 trainings will be conducted by project participant teams who have utilized the implementation funds.
- Two in-person trainings per year (1 on farm, 1 round-robin “classroom” style). During the on-farm training, the host farmer will provide primary instruction in year 1; in years 2 and 3, farm hosts will be paired and co-present with project participants. The round-robin training will be a stand-alone workshop or added to existing trainings to meet participant time management goals.
- Twelve quarterly check-ins among participants throughout the course of the project (web conferences).

Effective adult learning techniques will be implemented; for example program materials will be developed and distributed in advance, and webinar trainings will include time for discussion. This is particularly important given the Jan 2014 service provider survey where 85% of respondents preferred group discussion and 75% requested presentations from outside consultants.

SEE ATTACHED MILESTONES FOR YEARS 1, 2 AND 3

VERIFICATION OF LEARNING OUTCOMES

Online end of training surveys will be administered to all participants to measure knowledge gain, change in skills and behavior, specifically their intent to change the way they work with farmers. Data will provide summative program assessment.

Quarterly conference calls with participants will allow for monitoring of participant progress / provide formative program assessment, provide on-going participant support, and help verify performance targets.

2a. AG SERVICE PROVIDER ACTIONS PROJECT PERFORMANCE TARGET

12 Extension educators and other Vermont ag service providers use social sustainability “diagnostic” tools and info sheets in their programming to assess and address key social issues farm families face.

2b. INDICATORS OF AG SERVICE PROVIDER ACTIONS

- Number of farmer education programs and research projects that have been adapted and/or created to include social sustainability concepts.
- Number of farmers reached by these efforts.
- Data retrieved from participant program evaluations that document social sustainability (using project’s social sustainability indicators).

VERIFICATION OF PERFORMANCE TARGET

Participants will respond to an end-of-training surveys as well as annual follow-up surveys to verify changes in behavior relevant to the performance target.

Survey instruments used by beneficiaries where social sustainability topics were integrated will be collected and shared.

1a. FARMER ACTIONS DESIRED

Since social sustainability issues are unique across each individual farm and farm family, desired actions are variable. However, the following farmer actions are desired:

- Consideration and/or incorporation of social aspects into business and/ production decisions.
- Effective stress management that may arise as result of changes on the farm and/or family, e.g., farm diversification (entrepreneurship), farm succession, and climate change mitigation.
- Effective communication of quality of life goals with family members and service providers.
- Awareness of what to do and who to contact if they need help with social sustainability issues.
- Have an articulated plan on how to involve the community in and on the farm.
- A farm succession plan (including business transfer and estate plan) and/or exit strategy (for early life cycle businesses) written into farm business plans.
- Efforts made to balance work and family.
- Effective human resource plans and policies.

1b. INDICATORS OF FARMER ACTIONS

- Number of farms with farm succession plans.
- Number of farms with business plans that include an exit strategy.
- Number of farmers who express satisfaction with their family-work balance.
- Number of farms that increase participation in community activities and/or involve community on the farm.
- Number of farmers who indicated satisfaction with peer-and/or resource networks.
- Number of farmers who report an increase in use of personal stress management techniques.
- Number of “junior generation” farmers who express interest in the farm over the long-term.
- Number of farmers who participate in wellness and/or farm safety programs.
- Number of farm employees who feel well supported by their employers.

VERIFICATION OF FARMER ACTIONS (optional)

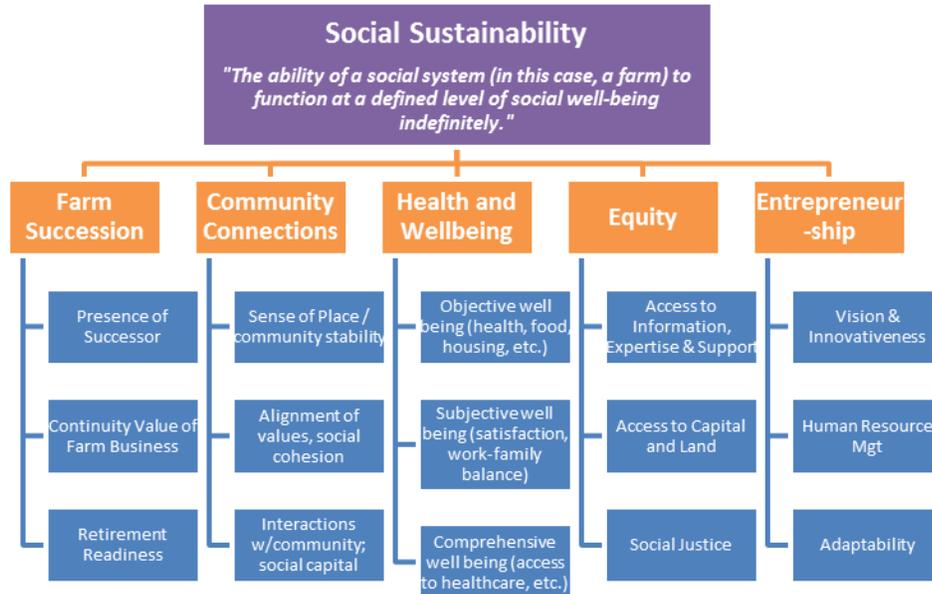
The project will not be reaching farmers directly. Participants will be asked to track farmer contacts and behavior change as a result of programs delivered. Survey questions using social sustainability indicators will be distributed; that data collected and compiled.

Vermont SARE State Program Project Plan: Social Sustainability on the Farm

About Social Sustainability

“Social sustainability” is generally defined as “the ability of a social system (in this case, a farm) to function at a defined level of social well-being indefinitely.” Since this term may be unfamiliar and/or unclear, Figure 1. serves as a graphical representation of the themes (in orange) the project hopes to address as well as examples of major topics (in blue) within each theme.

Figure 1. Key Themes of Social Sustainability



Project Plan and Milestones

YEAR 1 (10/14-9/15)

The project goals for year 1 are to develop checklists / matrices /info sheets as educator tools so they can use to a) better understand social sustainability and b) reference as a framework/tool/idea of how they might use in their current programming. By the end of year 1, we will have developed:

- i. A farm diagnostic tool using the family development cycle and touchpoints of the 5 social sustainability themes.
- ii. A farm diagnostic tool using the business cycle and touchpoints of the 5 social sustainability themes.
- iii. 5 info sheets that provide descriptions of each of the social sustainability themes and include 3-4 indicators for each theme, questions to measure each indicator.

Milestones for Year 1:

1. 90 Extension educators and other agricultural service providers learn about the training project through direct email invitation. (11/14)

2. 20 participants commit to learning about social sustainability and reviewing the diagnostic tools and info sheets through an online survey; they provide information about their specific learning goals and interests. (12/14)
3. 12 participants are accepted to the project and participate in year 1 webinars¹ on the following topics (1/15, 3/15, 5/15, and 7/15):
 - a. Life Cycles of Family Farm Business (with Mr. Dann Van der Vliet)
 - b. Business Cycle and How Families deal with Change, Loss, Opportunity and Resilience (with Dr. Sharon Danes)
 - c. The Human Side of Agriculture: Managing Tough Times (with Dr. Robert Fetsch)
 - d. Social Sustainability Indicators: An Update (with Dr. Diane Parent)
4. 12 participants participate in bi-monthly check-ins via web conference to develop social sustainability survey questions, learn about efforts to incorporate social sustainability topics into research and education from peers, provide project feedback, and track progress. (12/14, 2/15, 4/15, 6/15, 8/15, 10/15)
5. 12 participants review and refine life cycles of family system and business system diagnostic tools through half-day in-person training. (5/15)
6. 12 participants review info sheets and learn how to integrate social issues into current program through half day on-farm training (guided via an on-farm experience at Lilac Ridge Farm). (10/15)

YEAR 2 (10/15-9/16)

The project goals for year 2 are to test the diagnostic tools and info sheets in farmer programming (educational events, one-on-one consultations, etc.). Here, each of the 12 educators will choose at least one tool developed and apply it in ongoing or new programming.

7. Participants start to develop “implementation” plans to integrate social sustainability tools into their work that may include the following. Implementation funds will be distributed on as needed basis, based on application form: (10-12/15)
 - a. Integration of social sustainability concepts into their education, research and outreach programs.
 - b. On-farm training in collaboration with farm families.
 - c. One-on-one client consultations.
 - d. Professional development training for service providers.
8. 12 participants test social sustainability tools in their work. Surveys are developed and administered to farmer clients to assess the tools and effects of programming on social sustainability (12/15-6/16)
9. 12 participants participate in quarterly check-ins via web conference to refine social sustainability survey questions, learn about implementation plans and provide feedback to peers, provide overall project feedback, and track progress. (12/15, 3/16, 6/16, 9/16)
10. 12 participants compile social sustainability survey questions and responses and submit to coordinator who summarizes data. (8/16)
11. 12 participants respond to program survey about how they’ve used social sustainability tools to date, gaps and strengths of the tools. (9/16)

¹ Though the target audience of the webinars are project participants, they will be open to other service providers who may be interested. Additionally, webinar recordings will be posted as an online reference.

YEAR 3 (10/16-9/17)

The goals for year 3 are to continue to integrate social sustainability tools into programming, refine the tools and publish them for wider use among other educators; as well as compile a set of social sustainability indicators Extension educators can use in their work.

12. 4 project participants present in a webinar to share the successes and challenges of integrating social sustainability topics into their programs and any documents effects on farmer behavior. (12/16, 2/17, 4/17, 6/17)
13. 3 participants work with project PI to provide a 2 hour professional development training for 20 ag service providers on their implementation work. (5/17)
14. 12 participants participate in quarterly check-ins via web conference to finalize a set of social sustainability survey questions, share lessons learned, and track progress. (12/16, 3/17, 6/17, 9/17)
15. Through final project survey, 12 participants reveal they have integrated social sustainability tools into their educational programming and evaluation efforts. (9/17)

Key Individuals/Partners

Debra Heleba, Vermont state SARE coordinator with University of Vermont (UVM) Extension, will lead both the SARE outreach efforts and the professional development trainings. Deb brings a wealth of experience to the project, including nine years as outreach coordinator for the UVM Center for Sustainable Agriculture where she helped organize more than 50 conferences, workshops, trainings and tours for farmers, extension and agency personnel, chefs, and others interested in sustainable agriculture. Additionally, Deb has more than 10 years of experience providing education and support for families entering and exiting farm businesses, including Master's level research focused on family farm succession.

An informal group of advisors may be called upon to ground-truth and otherwise help guide the implementation of this project. They include UVM rural anthropologist Jason Parker, and UVM Extension's Lisa Chase and Beth Holtzman. These individuals have expressed interest in further exploration of this topic and have participated in past professional development activities offered by the Vermont state SARE program.

Subject matter experts (including farmers) that will be called on to provide their expertise (in webinar and in-person trainings) may include:

- Jennifer Blackwell, Elmer Farm
- Sharon Danes, University of Minnesota, professor and family economist
- Robert Fetsch, Colorado State University, Extension specialist and professor of human development and family studies
- Leslie Forstadt, University of Maine Cooperative Extension, child and family development specialist
- Willie Gibson, Vermont farm business management and farm family consultant
- Shoshanah Inwood, University of Vermont, rural sociologist
- Diane Parent, Laval University, researcher and director of TRAGET Laval (transfer-management-establishment in agriculture)
- Ross and Amanda Thurber, Lilac Ridge Farm
- Dann Van der Vliet, University of Vermont, family business initiative director

Outreach Plan

Our SARE outreach work conducted through presentations, exhibits, and social media will continue to help Vermonters (especially farmers and agricultural service providers) better understand SARE, its grants programs, and project results. Our outreach efforts will reach no fewer than 3,000 Vermonters annually. The following are planned or proposed outreach activities and events for October 1, 2014 – September 30, 2015:

- Exhibit: Vermont Farm Show, January 2015.
- Exhibit: Northeast Organic Farming Association of Vermont Winter Conference, February 2015.
- Exhibit: Greenworks (Association of Professional Horticulturalists) Annual Conference, February 2015.
- Exhibit: Vermont Cover Crop conference, February 2015.
- Presentation: graduate student grants program.
- Across the Fence television program: focus on graduate student grants program.
- Continue to build social media presence of SARE projects on LinkedIn, Twitter, and Pinterest.