

2014 Final Report for WVU, WVSU, UMD (Western MD) State PDP Program

Project Title: *Sustaining Family Farms and their Communities by Building New Capacity to enter and compete in Locally Accessible Higher-Value Markets*

1. Report Summary

a. Why this project?

Growing consumer demand for fresh, local products may lead to new market opportunities throughout the local food markets in the WV and Western Maryland region. More small family farms in WV and Western Maryland must successfully enter and compete in this local food market so that a greater share of the \$8.9 local food dollar spent stays within the WV and Western Maryland region to sustain local farming communities. In order to do this, producers must be able to identify and assess suitable local, accessible, higher-value markets that they can profitably serve given their specific resources, begin producing specifically for, and partner with similar producers to supply products that better meet the markets' demand.

b. What was done in this project to address the problem?

This project was conducted over three years (2011-2014) throughout WV and Western Maryland and used a train-the-trainer model - training was focused on the Cooperative Extension Educators/Agents, WV Department of Agriculture, Natural Resource Conservation Service field personnel and other agricultural education professionals that service food and ornamental producers in the WV and Western Maryland region. The project emphasized three core components for supporting producers who want to find and enter new, local, accessible, higher-value markets, namely:

(a) Market Analysis, Capacity Assessment and Visioning

(b) Providing Technical Assistance to Build Capacity on Key Topics – Sustainable Production Practices, Value-adding and Direct Marketing, Food Safety, and Farm Financial Management

(c) Providing Opportunities for Networking and Collaboration in Production and Marketing.

The education program was delivered through a series of presentations, workshops, webinar presentation, farm demonstrations, and on-line activities, field visits to farms and/or direct market outlets, and strategic planning and visioning meetings.

c. What happened as a result of this project?

This program targeted a general group of Agricultural Service Providers (ASPs) in WV and Western MD with training using a whole-farm planning and risk management approach to equip them to better help their clientele build capacity to enter and compete in locally accessible higher-value markets. Over the three years, the program reached more than 127

ASPs (with 25% of them attending more than 50% of the entire program), and more than 3,000 producers (with about 3% of them attending more than 50% of the entire program).

Seventy-eight of the 127 ASPs educated through this program conducted some type of educational activities for more than 9,000 producers, based on their learning from the project. A core group of 33 ASPs conducted targeted educational programs for more than 3,000 farmers on marketing, meeting demand specifications, and business planning strategies for identifying and selling in new or expanded markets (i.e. conducting a market analysis to identify higher-value market opportunities, adding-value and directly market their products to target markets, identifying and meeting market specifications and food safety requirements, using simple farm management tools like enterprise budgets and financial statements to assess their financial situation and increase profitability, and partnering with others to share best practice and improve profitability). ASPs used a variety of teaching methodologies to encourage sustained learning among the farmers and generated multiple over 100 educational resources for use in their educational programs.

ASP's report that 100% of the producers trained had implemented or intended to implement at least one of the recommended directed towards entering and competing in a new or expanded local, accessible, higher-value markets.

d. Details about changes in farmer practices as a result of service providers' efforts

This project complemented other extension and sustainable agriculture initiatives in the state but uniquely targeted small-scale producers seeking to enter higher-value markets. Varied pedagogical methods were integrated by the project team and ASP in their educational programs to tailor the program to the targeted audience and to facilitate sustained learning. These included hands-on/interactive face-to-face and on-line curriculum, on-farm demonstrations and field trips, and mentoring/coaching activities.

ASPs report that all farmers participating in the project had implement or intended to implement at least one of the recommended actions directed towards entering and competing in a new or expanded local, accessible, higher-value markets (i.e. conduct a market analysis, add-value and directly market their products, identify and meet market specifications and food safety requirements, use simple farm management tools like enterprise budgets and financial statements, and partner with other producers and with direct marketing outlets to share best practice and improve profitability).

Additionally, ASPs reported other practices being pursued by farmers as a result of project participation, including Increased requests from project participants for products or services provided by partnering agencies (NRCS, FSA, Farm Credit, Secretary of State, Farm-to-School Initiative, VC2's marketing and accounting services, Farmers Market Association, WVDA Specialty Crop Block Grant, etc.). Additionally, producers are increasingly attending other training events to sharpen their skills.

e. Unexpected/unanticipated outcomes and benefits beyond those verified for performance target, e.g. related to institutional support, new funding, new partnerships, etc.

The ASPs have used a variety of pedagogical tools to help provided sustained learning for their clientele. They have conducted more than 1,120 Workshops/Field Days, 106 On-farm Demonstrations, 1,320 Webinars/Talks/Presentations, 9 On-line training/Short-Courses, >7,000 Individual Consultations, 220 Fact sheets/Guidance documents, 600 Articles (newsletter, press), and have continuously updated their websites with project materials.

In addition to the above direct outcomes from the project, ASPs have led the planning and implementation of 4 regional (multi-county) Conferences, as a result of project participation; gave 9 National Presentations; published 5 referred articles; and have 6 Manuscripts in progress, all related to the project. The project has resulted in 23 New Working Collaborations (including Farm-to-Institution, Farmer Alliances, Agritourism Initiative, etc.), 27 New Grants applications, and 16 Grants received.

Overall, this project has helped build an effective regional team of educators and collaborators with the knowledge, experience, passion and commitment for helping WV producers lead profitable agribusinesses. This project will help strengthen participants' farm profitability and long-term viability; improve inter-agency connections and communications; and build long-term partnerships among agribusinesses and agriculture service providers, producing learning and networking multiplier effects beyond the life of the project.

2. Performance Target(s)

Thirty of the 110 Agricultural Service Providers (AG SP) educated through this program will teach 300 farmers about marketing, meeting demand specifications, and business planning strategies for identifying and selling in new or expanded markets (i.e. how to conduct a market analysis to identify and assess targeted higher-value market opportunities, how to add-value and directly market their products to target markets, how to identify and meet market specifications and food safety requirements for these new or expanded markets, how to use simple farm management tools like enterprise budgets and financial statements to assess their financial situation and increase profitability, and how to partner with other producers and with direct marketing outlets to share best practice and improve profitability).

One hundred of these 300 producers will implement at least one of the recommended actions directed towards entering and competing in a new or expanded local, accessible, higher-value markets (i.e. conduct a market analysis, add-value and directly market their products, identify and meet market specifications and food safety requirements, use simple farm management tools like enterprise budgets and financial statements, and partner with other producers and with direct marketing outlets to share best practice and improve profitability).

3. Report on 2013-2014 Milestone Accomplishments

- a. **Milestone 1:** ASPs continue to receive monthly phone calls to monitor the progress and challenges of farmer training programs in their respective counties – **from October 2013 – September 2014.**

Milestone Progress:

Participants received continuous communication (conference calls, e-mails and personal visits) to help ASPs plan and implement farmer training, and provide support for same. A bi-monthly newsletter (SARE-WV E-News) was developed; participants received project related updates and resources for dissemination to their clientele.

- b) **Milestone 2:** ASPs continue to receive technical, administrative and financial support to AG SP in their farmers training/outreach programs as needed – **from October 2013 – September 2014.**

Milestone Progress:

- Support Resources: 31 ASPs receive flash-drives and folders with training materials curriculum materials, copies of slide presentations and resource materials, templates, worksheets and decision tools to use with farmer participants, and verification surveys to use in their own education programs. These can also be accessed from the project's website or Dropbox resources.
- WVU PDP-Related Conference Tracks: Over 45 participants (ASPs and Farmer Leaders) attended follow-up, project related, NESARE-sponsored sessions at one of the following events: WVUES Small Farms Conference 2014, WVUES Urban Agriculture Conference, or the WV Women in Agriculture Conference. Participants learnt about a variety of topics; overall, participants increased their knowledge and skills in sustainable crop, livestock and ornamental production and related practices to help producers better meet existing and new higher-value market opportunities.
 - 20 ASPs/Farmer Leaders were awarded SARE scholarships to attend farmer training opportunities at one of the following events: WVUES Small Farms Conference 2014, WVUES Urban Agriculture Conference, or the WV Women in Agriculture Conference.
- SARE Project Related Topics listed below were co-organized and co-sponsored by the WVU PDP Project. These are SARE-PDP related activities that the SARE PDP team have recommended and help coordinate to get into the program for the Small Farm Conference. The SFC is one of the premier training events in WV for both ASP and

farmers alike. The state program also sponsored some ASP and farmer leaders to attend these trainings.

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 - a) Opportunities in the Meat Business (59 attendees)
 - b) High Tunnel/Season Extension Mechanics Track - All-Day Workshops – (114 attendees)
 - c) The Basics of Adding Value (27 attendees)
 - d) Price Determination (28 attendees)
 - e) Marketing Track – Traditional versus Online Marketing, Making a Sales Pitch, etc. (62 attendees)
 - f) Pricing your Products for Market (31 attendees)
 - g) Financial Analysis and Management Track (72 attendees)
 - h) FSMA, Food Safety 101 and Developing a Food Safety Plan Track (57 attendees)
 - i) Agritourism Track: Four sessions in hospitality, marketing, economics and liability (124 attendees)
 - j) Applying Communication Styles as an Effective Marketing Tool (11 attendees)
 - k) High Tunnels Track – Production, Management and Economics (65 attendees)
- Professional Development Days – Seventy ASPs attended one of three SARE-PDP professional development session held in conjunction with the WVUES Professional Development Days.
 - “The FDA Food Safety Modernization Act: What it Means for You and Your Producers and Processors” – Professional Development Days, March 19, 2014. 17 participants understand critical marketing concepts (pricing, production planning and supply, labelling, storage invoicing, promotion, negotiating and communication, quality assurance, working cooperatively, etc.), and how to adapt responses to different markets namely institutions, restaurants, and wholesale markets. Session evaluations indicated more producers will use information to enhance their marketing strategies.
 - “Advanced Social Media and Mobile Technology for Agricultural Businesses” – Professional Development Days, March 19, 2014. 17 participants understood effective social media and mobile technology tools and management strategies as they relate to farm and food businesses, particularly those involving direct marketing. Participants showed an interest in evaluating these tools for future use.
 - “SARE Agent to Farmer Training Modules - Booth Camps for your Farmers” – Professional Development Days, March 19, 2014 and WVCAA Meeting, April

16th, 2014. 75 Participants learnt of 4-‘canned’ Agent to Farmer short courses and workshops, funded by NESARE, for possible delivery in their county over the next 1-2 years. To date, 18 agents have used these programs for the farmer trainings.

- “SARE Agent to Farmer Training Module - Booth Camps for your Farmers”. Based on the first two years of PDP project training, the project team and trained ASPs developed 5 ‘Canned’ Training Modules that other ASPs could use in their farmer training program. These modules are available on the project’s website (<http://anr.ext.wvu.edu/sustainable-ag/sare>), and from our Dropbox resources. These modules are developed using the generic SARE PDP training topics, but modified so as to meet the needs of specific clientele in specific areas.
 - Pastured Poultry Short-Course Module: Covers production and management issues; financial and market feasibility, marketing and food-safety considerations, and scale-appropriate processing equipment and processes.
 - Farm-to-School Short-Course Module – Covers market analysis and velocity report analysis; scheduling and aggregation; financial analysis and pricing considerations; farm and food safety issues; and communication styles.
 - Ready for Market 1 Short-Course Module – Covers Rules & Regulations, Specialty Crops, Social Media & Technology, Business Communication Styles, Direct Marketing, Farm & Food Safety Farm 2 School, Pricing/Record Keeping, Agri-tourism, Business Planning, Velocity Report & Market Analysis, Production Scheduling & Cropping timeline, Visual Merchandising & Packaging, and Collaborations and Networking.
 - Ready for Market 2 Short-Course Module – Advance level marketing training to further training from (3) above, and include “Reading the Farm’ field tour.
 - Livestock Grazing School: The goal of this program is to educate producers on better ways to manage their grazing lands and, in turn, help them adopt these practices in order to increase profitability of their operations by utilizing their resources in a more effective and efficient manner while decreasing the impact their livestock have on the environment.
 - To date, 18 county/multi-county programs have already been implemented using these modules.
- “Market Ready” Training Workshops: 36 ASPs and farmer leasers understand critical marketing concepts (pricing, production planning and supply, labelling, storage invoicing, promotion, negotiating and communication, quality assurance, working cooperatively, etc.), and how to adapt responses to different markets namely institutions, restaurants, and wholesale markets. Session evaluations indicated more producers will use information to enhance their marketing strategies.
- “Small-Scale, Backyard or Pastured Poultry production Workshops.” 152 ASPs, farmer leaders and farmers attended 1 of 8 (3-hour) workshops covering business and feasibility planning, food safety regulations and recommendations, and production

systems, nutrition and processing considerations; participants completed a hands-on poultry processing demonstration session; and participants evaluated and adopted use of record-keeping templates. Post-evaluation suggest more producers will enter small-scale poultry production.

- Livestock Grazing School: 13 ASPs and farmer leaders understood about better ways to manage their grazing lands and to increase profitability of their operations by utilizing their resources in a more effective and efficient manner while decreasing the impact their livestock have on the environment.
- Business Planning and Risk Management for Profitability: 165 ASPs, farmer leaders and farmers engaged in 1 of 6 state-wide sessions on business planning, record-keeping and financial analysis and management. Participants indicated they intend to use the financial templates and three-page business plan template as a way to jumpstart their business planning.
- Agritourism Initiative – The WV Agritourism Initiative was born out of the SARE PDP training. ASPs and farmer leaders wanted a workshop series specifically devoted to agritourism. We developed the “Growing Agritourism and Farm-based Education in WV – Managing Risks for Improved Income Diversification” Training Course. 40 ASPs, farmer leaders and farmers participate in an intensive (4 day-long workshops) holistic business-planning and risk-management program for agritourism operators and owners, covering marketing analysis, assessing potential, the business-side of agritourism, farm safety and liability, emergency and event planning, hospitality management, and marketing.

c) Milestone 3: Continue updating project website (<http://anr.ext.wvu.edu/sare>) to provide a forum for publishing and discussing the progress and success of the project—**from October 2013 – September 2014.**

Milestone Progress:

- Website created (<http://anr.ext.wvu.edu/sustainable-ag>) to provide information to all stakeholders about the project and upcoming activities. On-line curriculum was developed for participants and those unable to attend training events, to access materials for use in their farmer training sessions. Curriculum includes all training materials and resource materials, templates, worksheets and decision tools to use with farmer participants, and verification surveys to use in their own education programs. Site has had more than 3,000 visits to date (although we have designated ASP and farmer pages, it is difficult to distinguish between farmer and ASP visits because we did not track this metric. We will do this in the future).
- Facebook page created (<https://www.facebook.com/WVSARE>) to provide opportunities for networking and collaborative learning and mentoring. Key insights have been ‘mined’ from postings and used to provide learner-generated curriculum changes that will improve subsequent agent and farmer instruction. Site has 497

lifetime total likes, with a 'daily page engaged user' of 3,400 (daily users that engaged with our page).

- d) Milestone 4:** 35 AG SP and 100 farmers will attend one of three combined field days co-hosted by the project team and trainees (AG SP) to share best-practice and build confidence and mentoring skills in the local food system – **from April 2014 – September 2014.**

Milestone Progress:

- “Reading the Farm” Farm Tour Series - 67 attendees including farmers, Agents and Specialists from WV and MD, and agency representatives, attended 1 of 4 day-long field trips increased understanding of the concept of HOLISTIC/WHOLE-FARM PLANNING for improving viability and sustainability; participants engage in SWOT analysis and developed recommendations for helping host farm improve their operations. The field days were held in three strategic locations in WV so as to be accessible to all targeted beneficiaries (including those in Western Maryland). This activity brought together our key resource persons, agricultural service providers from a range of agencies (each with varied expertise and experiences) and farmer leaders, to learn from our resource persons and from each other. Our main goal was to integrate the specific project topics we have covered (market assessment, sustainable production initiatives, value-adding and direct-marketing initiatives, farm/food safety improvements, financial management and marketing alliances) and help our ASPs and farmer leaders understand the concept of whole-farm planning - that change in one area of farm management usually requires a complementary change(s) in other areas of the business.

- e) Milestone 5:** Begin formal field evaluation of the project (comprehensive surveying of AG SP and farmers about their learning and resultant actions) through a comprehensive verification survey. The verification survey will be conducted at two levels; at the ASP level and at the farmer level.– **from January – September 2014.**

Milestone Progress:

- Conducted a comprehensive Needs Assessment survey. The needs assessment survey was conducted at two levels (ASPs and Producers) and had 3 overall objectives, namely:

1. To determine the state of knowledge, ability, interest, and adoption of ASP versus producers with regard to sustainable agriculture programs in WV.
2. To determine what our audience already knows and believes, and what gaps still exist, so we can design of effective educational programs in the future.
3. To determine what we can do to make our programs more accessible, acceptable and useful to our clientele.
4. To date, 56 ASP (WVUES, WVSUES, UMDDES, NRCS, WVDA, WV Farm and Food Coalition, WV Farmers Market Association) and 127 producers/farmer leaders have responded to this survey. Results have been used to develop the 2014-2017 State PDP Plan for WV.

- Conducted a Verification Survey of our core ASPs and farmer leaders, but also surveyed other agents that have participated in our program intermittently. Results are being used to develop this report.

- f) **Milestone 6:** Begin formal field evaluation of the project (comprehensive surveying of AG SP and farmers about their learning and resultant actions) through a comprehensive verification survey. The verification survey will be conducted at two levels; at the ASP level and at the farmer level – **September 2014.**

Milestone Progress:

- Milestone replaced with Survey Monkey verification and needs assessment survey. Personal communication was conducted with core ASPs and farmer leaders to discuss the project results and evaluate the overall success of the project, and to, determine the future direction of joint sustainable agriculture initiatives between WVU and WVSU, and other strategic state partners.

4. 3-Year Summary of Activities, Participants, Learning Outcomes and Products

Table 1 – Activities.

Type of Educational Activity Conducted by Project	Number of Each Activity Conducted
Workshop/Field Day	67
On-farm Demonstration	7
Tour	4
Webinar/Talk/Presentation	78
Other on-line training/Short-Course (Multiple Days)	9
Individual Consultations (an estimate is acceptable)	200
Other (Surveys)	3

Table 2 – Participants (unique individuals reported)

Type of Agricultural Service Provider	Number Who Participated (Attended < 50% of sessions)	Core Group (Attended >50% of sessions)
Extension		
NRCS		
Other Federal/State Agency		
Other (specify)		
Total Number of Agricultural Service Providers*	127	33 ASP
Farmers	More than 3,000	75 Farmers

Table 3 - Learning Outcomes.

<p>Verified an increase in knowledge, skills, confidence:</p>	<p>Total Number of ASP</p>	<p>Total Number of Farmers</p>	<p>Total acres or animals the farmers manage</p>
<p>A. Sustainable Production Practices</p> <ul style="list-style-type: none"> - Identify the best farm enterprise to add or expand based on market analysis, labor and resource availability and production knowledge; - Understand the importance of crop/livestock/horticulture/livestock diversity for sustainable production and marketability; - Utilize new production systems and new varieties of crops/ornamentals and new breeds of livestock; - Understand niche market issues and marketing opportunities (organic, local, natural, specialty); - Understand production certification choices, benefits, costs and marketing opportunities; - Understand season extension and protected culture management; 	<p>93 (100%)</p>	<p>>3,000 (100%)</p>	<p>Estimated (160,000 acres)</p>
<p>B. Value-Adding and Direct-Marketing</p> <ul style="list-style-type: none"> - Learn how to identify new, higher value direct markets for food products; - Explore the feasibility of value-added product enterprises; - Understand effective and innovative marketing strategies to support production efforts; - Build a marketing strategy to take direct responsibility for marketing one’s farm production rather than simply ‘dumping’ it into wholesale marketing channels; - Understand how to build and sustain profitable agritourism operations as a value-added activity; 	<p>93 (100%)</p>	<p>>3,000 (100%)</p>	<p>Estimated (160,000 acres)</p>
<p>C. Food Safety</p> <ul style="list-style-type: none"> - Understand the various state and federal policies and regulations regarding directly marketing foods and ornamentals in multiple market outlets within the 	<p>93 (100%)</p>	<p>>3,000 (100%)</p>	<p>Estimated (160,000 acres)</p>

<p>local food system;</p> <ul style="list-style-type: none"> - Understand the need for proper production, harvesting and post-harvest procedures - specifically GAPs/GHPs and GMPs, and how to comply with proper procedures; - Establish and implement Food Safety Plans appropriate for direct marketing of crops, livestock or ornamentals. 			
<p>D. Farm Financial Management</p> <ul style="list-style-type: none"> - Understand the basics of farm business planning and analysis – strategic business planning, writing a business plan, record-keeping, budgeting, financial statement analysis, understanding the legal and regulatory environment governing direct markets for various products, business succession planning,; - Understand how to set up a simple record-keeping system and what numbers to collect for different purposes (borrowing, financial analysis, taxes, etc.); - Organize and use these records to develop enterprise budgets and simple financial statements; - Organize and use these records and a comprehensive set of computerized ‘interactive’ financial templates to develop enterprise budgets and simple financial statements to estimate costs, returns, and break-even points for an optimal production system; - Organize and use these records to calculate other meaningful measures of financial performance, such as liquidity and efficiency indicators, that will clearly demonstrate the progress towards realizing one’s strategic goal; - Use these financial management tools to make effective decisions on pricing, assess markets and review product and enterprise mix - new farmers will learn how to assess potential farm enterprises, and explore the feasibility of their plans before they make expensive decisions; - Learn how to combine these tools with a pragmatic marketing strategy to build a viable business plan. 	<p>93 (100%)</p>	<p>>3,000 (100%)</p>	<p>Estimated (160,000 acres)</p>

<p>E. Opportunities for Networking and Collaborations in Production and Marketing</p> <ul style="list-style-type: none"> - Understand benefits from networking, collaborating and partnering with other producers and with food and ornamentals purchasers to share production and marketing best practices to take greater advantage of higher value retail markets; - Help producers effectively network, collaborate or partners to take greater advantage of higher value markets. 	<p>93 (100%)</p>		<p>Estimated (160,000 acres)</p>
<p>Verified intention to use knowledge and/or skills learned</p>	<p>Total Number of ASP</p>	<p>Total Number of Farmers</p>	<p>Total acres or animals the farmers manage</p>
<p>A. Sustainable Production Practices</p> <ul style="list-style-type: none"> - Identify the best farm enterprise to add or expand based on market analysis, labor and resource availability and production knowledge; - Understand the importance of crop/livestock/horticulture/livestock diversity for sustainable production and marketability; - Utilize new production systems and new varieties of crops/ornamentals and new breeds of livestock; - Understand niche market issues and marketing opportunities (organic, local, natural, specialty); - Understand production certification choices, benefits, costs and marketing opportunities; - Understand season extension and protected culture management; 	<p>93 (100%)</p>	<p>>3,000 (100%)</p>	<p>Estimated (160,000 acres)</p>
<p>B. Value-Adding and Direct-Marketing</p> <ul style="list-style-type: none"> - Learn how to identify new, higher value direct markets for food products; - Explore the feasibility of value-added product enterprises; - Understand effective and innovative marketing 	<p>93 (100%)</p>	<p>>3,000 (100%)</p>	<p>Estimated (160,000 acres)</p>

<p>strategies to support production efforts;</p> <ul style="list-style-type: none"> - Build a marketing strategy to take direct responsibility for marketing one’s farm production rather than simply ‘dumping’ it into wholesale marketing channels; - Understand how to build and sustain profitable agritourism operations as a value-added activity; 			
<p>C. Food Safety</p> <ul style="list-style-type: none"> - Understand the various state and federal policies and regulations regarding directly marketing foods and ornamentals in multiple market outlets within the local food system; - Understand the need for proper production, harvesting and post-harvest procedures - specifically GAPs/GHPs and GMPs, and how to comply with proper procedures; - Establish and implement Food Safety Plans appropriate for direct marketing of crops, livestock or ornamentals. 	<p>93 (100%)</p>	<p>>3,000 (100%)</p>	<p>Estimated (160,000 acres)</p>
<p>D. Farm Financial Management</p> <ul style="list-style-type: none"> - Understand the basics of farm business planning and analysis – strategic business planning, writing a business plan, record-keeping, budgeting, financial statement analysis, understanding the legal and regulatory environment governing direct markets for various products, business succession planning,; - Understand how to set up a simple record-keeping system and what numbers to collect for different purposes (borrowing, financial analysis, taxes, etc.); - Organize and use these records to develop enterprise budgets and simple financial statements; - Organize and use these records and a comprehensive set of computerized ‘interactive’ financial templates to develop enterprise budgets and simple financial statements to estimate costs, returns, and break-even points for an optimal production system; - Organize and use these records to calculate other meaningful measures of financial performance, such as liquidity and efficiency indicators, that will clearly demonstrate the progress towards realizing one’s 	<p>93 (100%)</p>	<p>>3,000 (100%)</p>	<p>Estimated (160,000 acres)</p>

strategic goal; - Use these financial management tools to make effective decisions on pricing, assess markets and review product and enterprise mix - new farmers will learn how to assess potential farm enterprises, and explore the feasibility of their plans before they make expensive decisions; - Learn how to combine these tools with a pragmatic marketing strategy to build a viable business plan.			
E. Opportunities for Networking and Collaborations in Production and Marketing - Understand benefits from networking, collaborating and partnering with other producers and with food and ornamentals purchasers to share production and marketing best practices to take greater advantage of higher value retail markets; - Help producers effectively network, collaborate or partners to take greater advantage of higher value markets.	93 (100%)	>3,000 (100%)	Estimated (160,000 acres)

Table 4 – Products – produced by the state program and provided by speakers and trainers over the three years.

Type of Information Product Produced	Number of Each Type Produced
Fact sheet/Guidance document	41
Decision tool	47
Website/web content (Facebook)	2 (Facebook and Webpage A/cs.)
Article (newsletter, press)	16
Curricula	9 (Formal, canned-curricula)
Video	1
Other (National/Regional Presentations)	5

5. Performance Target Outcomes and Additional, Unanticipated Outcomes

a. Summarized Outcome Data

Table 5 – Numbers of agricultural service providers taking action

- The project verification survey asked ASPs for the total number of farmers reached by any of the methods in Table 6 (below). Responses from 78 ASPs are below.
- The survey also asked ASPs to report what % of farmers adopted/intend to adopt versus will not adopt recommended practices as outlined (based on post-session evaluations or post-project verification surveys). ASP reported back percentages of farmers reached, not actual number of farmers.

The total number of agricultural service providers who incorporated information and/or used skills learned through the state program training activities in their educational activities, services and/or information products for farmers.	78
The total number of farmers these agricultural service providers reached through their efforts.	>9,000

Table 6 – Actions taken by the agricultural service providers

Place an X next to all that apply	Types of Educational Activities Ag Service Providers incorporated information they learned into	Number of Each Activity Type, if known (Approx.)
X	Workshop/Field Day	1,120
X	On-farm Demonstration	106
X	Webinar/Talk/Presentation	1,320
X	Other on-line training/Short-Course	9
X	Individual Consultation (an estimate is acceptable)	>7,000
X	Fact sheet/Guidance document	220
X	Article (newsletter, press)	600
X	Web content	Ongoing
X	Other (Conference – ASP Developed)	4
X	Other (National Presentations)	9

Table 7 – OPTIONAL - Actions taken by farmers

(Comment – Agents asked farmers whether they did/intend to make a management change; so we are reporting either made a change or intend to make a change. Also they did not report number of farmers but rather percent of farmers that did/intend to make a change)

The number of farmers who made a management change as a result of learning from the project activities and/or the trained agricultural service providers?	(% of Farmers)
- Conduct a market analysis (food velocity report) to identify and assess targeted higher-value market opportunities within their local area and use it identify and implement sustainable approaches to serve this market.	43%
- Utilize new /improved production and management systems and new varieties of crops/ornamentals and new breeds of livestock, to better meet existing and new higher-value market opportunities;	100%
- Develop a Food Safety Plan to address GAPs/GHPs/GMPs as a result of the knowledge and skills gained by attending and successfully completing the WV Better Process Control School.	52%
- Conduct feasibility study of diversifying farm to include value-added enterprise (including agritourism).	85%
- Keep simple and appropriate farm records, and use simple farm management tools like enterprise/partial budgets and computerized 'interactive' financial templates to assess the viability of new or expanded markets and increase farm profitability.	88%
- Partner with other producers and with direct marketing outlets to share best practice in production and marketing; and to improve profitability by capitalizing on aggregation benefits.	55%
- Use new/improved marketing strategies (traditional or online) for reaching new or expanded markets.	90%
- Develop a 5-page business plan (including financial and marketing plans) to helps achieve strategic farm and family goals (and incorporating major elements of all of the above)	35%
Number of acres, animals, or other appropriate production units that were affected by these changes. <i>(please enter your best estimate; you may leave this blank if you have no idea)</i>	Unsure (did not ask)

Table 8 – OPTIONAL – Additional outcomes as a result of the project

Type of Outcomes Achieved	Number of Each Outcome
New working collaboration	<u>23</u>
Grants applied for	<u>27</u>
Grants or other funds received	<u>16</u>
Other (Request to Partner Agencies as a result of training eg. NRCS, Farm Credit, FSA, WVDA, WV Farm and Food Coalition, WV Farmers Market Association, WV Community Development Hub, etc.)	Partner agencies have indicated a rise in requests for services from persons participating in our projects - difficult to get an exact number

b. Outcome Narrative

The project *“Sustaining Family Farms and their Communities by Building New Capacity to enter and compete in Locally Accessible Higher-Value Markets”* was predicated on the premise that growing consumer demand for fresh, local products may lead to new market opportunities throughout the local food markets in the WV. More small family farms in WV must successfully enter and compete in this local food market so that a greater share of the \$8.9 local food dollar spent stays within WV to sustain local farming communities. In order to do this, producers must be able to identify and assess suitable local, accessible, higher-value markets that they can profitably serve given their specific resources, begin producing specifically for, and partner with similar producers to supply products that better meet the markets’ demand. This project was conducted over three years throughout WV and used a train-the-trainer model, with subsequent train-the-producer activities led by trained ASPs.

The project emphasized three core components for supporting producers who want to find and enter new, local, accessible, higher-value markets:

- **Market Analysis, Capacity Assessment and Visioning** – Helping ASPs understand the positive economic and social value of the local food system to local communities and the opportunities WV and WMD producers have to market and sell foods locally. ASPs learned how to use food velocity reports to analyze buyers’ food purchasing patterns, and track the buying preferences; and to identify demand for specific food products (quantity, quality and timing of demand) among restaurants, institutions, and other food purchasers. ASPs were able to use this information to producers match identified

demand with existing supply capacity, and to develop strategies for producing and marketing products to meet a recognized demand.

- ***Providing Technical Assistance to Build Capacity on Key Topics*** – Understanding where market demand lies and identifying new market opportunities is an important first step for farmers, but farmers will require technical assistance in a number of production, processing, marketing and financial planning areas in order to take advantage of new opportunities. We provided additional education on the topics outlined below to help producers, and the ASPs who advise them, learn how to build and maintain commercially viable, scale-appropriate, sustainable food and ornamental operations to better meet the needs of the local food and cut-flower purchasers.

- *Sustainable Production Practices*: We conducted training on sustainable crop, livestock and ornamental production practices that producers need to know to better meet existing and new higher-value market opportunities:
- *Value-Adding and Direct-Marketing*: We conducted trainings on the feasibility of value-added enterprises; strategies and opportunities to add value to products; learned about effective and innovative marketing strategies to support value-added efforts and increase sales; and building a business plan to ‘produce for a market rather than simply marketing what you produce’.
- *Food Safety*: We conducted trainings on the importance of food safety; the food safety requirements for direct-marketing to major markets; and how to develop and implement a Food Safety Plan for direct-marketing to these new/expanded markets.
- *Farm Financial Management*: To be successful and achieve stability in any new farm enterprise, producers must understand principles of sound farm financial management and know how to use a variety of simple tools and resources to help assess financial situation and increase profitability. We conducted trainings on the importance of record keeping and farm financial management; tools to develop record-keeping and financial management systems; and how to combine these tools with a pragmatic marketing strategy to build a viable business plan.

- ***Providing Opportunities for Networking and Forging Partnership in Production and Marketing*** - We also focused on strengthening the local food system by providing more education about opportunities for networking and partnering to share production and marketing best practices, and to take greater advantage of local, accessible, higher-value markets. ASPs learned how to organize and motivate producers to engage in innovative collaborations and networks.

Ag service providers received follow-up support from the program to enhance their educational efforts with farmers by means of curriculum materials, copies of slide presentations and resource materials, templates, worksheets and decision tools to use with farmer participants, and verification surveys to use in their own education programs. ASPs have free and open access to educational events through our interactive on-line curriculum. Our website and Facebook media also allowed for collaborative learning by encouraging ASPs to join in virtual discussions about project topics.

Overall, the performance target outcomes for ASPs and farmers were exceeded far beyond our expectations. All participants at the ASP and farmer level indicated an increase in knowledge, skills and confidence following training compared to their initial level. In terms of adoption of these strategies, all participants (ASPs and farmers) have implemented/intend to implement at least one of the recommended actions directed towards entering and competing in a new or expanded local, accessible, higher-value markets (i.e. conduct a market analysis, add-value and directly market their products, identify and meet market specifications and food safety requirements, use simple farm management tools like enterprise budgets and financial statements, and partner with other producers and with direct marketing outlets to share best practice and improve profitability).

This project complemented other extension and sustainable agriculture initiatives in the state but uniquely targeted small-scale producers seeking to enter higher-value markets. Varied pedagogical methods were integrated to tailor the program to the targeted audience and to facilitate sustained learning, including hands-on/interactive face-to-face and on-line curriculum, on-farm demonstrations and field trips, and mentoring/coaching activities. Other factors contributing to the success of this program included:

- Providing a whole-farm planning curriculum using updated tools and technologies, and delivered in the interactive and conversational format that adult learners reported they prefer;
- Training ASPs producers, and helping ASPs deliver farmer educational programs and on-going coaching/mentoring assistance, to help 'hold producers' hands' as they make adoption decisions;
- The networking and partnership opportunities provided were designed to foster peer-learning, build confidence among beginning farmers, and share best practice;
- The 'Reading the Farm' field tours allowed participants to network and witness best practices at work;
- We built a cadre of local resource personnel and collaborators to provide on-going support for participants upon project completion;
- We developed distance-education module to expand the project's audience; and
- We provided an updated and interactive project website for additional resource, but also as a networking opportunity for participants; and
- We partnered with related agencies to streamline educational programs and networking opportunities, for ASPs and farmers alike.

Overall, this project has helped build an effective regional team of educators and collaborators with the knowledge, experience, passion and commitment for helping WV producers lead profitable agribusinesses. This project will help strengthen participants' farm profitability and long-term viability; improve inter-agency connections and communications; and build long-term partnerships among agribusinesses and agriculture service providers, producing learning and networking multiplier effects beyond the life of the project.

Performance Target Outcomes

To date, 78 of the 110 Agricultural Service Providers (AG SP) educated through this program have conducted training (or have incorporated project information in their training activities) for over 9,000 farmers (from 2011-2014) about marketing, meeting demand specifications, and business planning strategies for identifying and selling in new or expanded markets (i.e. how to conduct a market analysis to identify and assess targeted higher-value market opportunities, how to add-value and directly market their products to target markets, how to identify and meet market specifications and food safety requirements for these new or expanded markets, how to use simple farm management tools like enterprise budgets and financial statements to assess their financial situation and increase profitability, and how to partner with other producers and with direct marketing outlets to share best practice and improve profitability). All of these producers have implemented/intend to implement at least one of the recommended strategies directed towards entering and competing in a new or expanded local, accessible, higher-value markets.

The ASPs have used a variety of pedagogical tools to help provided sustained learning for their clientele. They have conducted more than 1,120 Workshops/Field Days, 106 On-farm Demonstrations, 1,320 Webinars/Talks/Presentations, 9 On-line training/Short-Courses, >7,000 Individual Consultations, 220 Fact sheets/Guidance documents, 600 Articles (newsletter, press), and have continuously updated their websites with project materials. ASPs have led the planning and implementation of 4 regional (multi-county) Conferences, as a result of project participation; gave 9 National Presentations; published 5 referred articles; and have 6 Manuscripts in progress, all related to the project. The project has resulted in 23 New Working Collaborations (including Farm-to-Institution, Farmer Alliances, Agritourism Initiative, etc.), 27 New Grants applications, and 16 Grants received.

Partner agencies, including NRCS, Farm Credit, FSA, WVDA, WV Farm and Food Coalition, WV Farmers Market Association, WV Community Development Hub, etc., have syndicated a rise in requests for services from persons participating in our projects.

Notable Outcomes:

- 1) ASPs have led the planning and implementation of 4 regional (multi-county) Conferences, as a result of project participation (the 'WV Farm Opportunity Days' Conferences 2013, 2014; the WV Urban Ag Conference, 2014; and the WV Women in Agriculture Conference, 2014).
- 2) ASP's abstract that credits WV-SARE PDP project (Abstract published in 99th Annual Meeting and Professional Improvement Conference for the National Association of County Agricultural Agents held July 20-24, 2014 in Mobile, Alabama)

agriculture for years to come. Beginnings as an idea for part of a SARE Professional Development Program, an urban agriculture training idea blossomed into a two-day conference involving multiple agencies. The conference attracted 230 participants from across the state, many of whom were new a

- 3) ASP's journal articles that credits WV-SARE PDP Project (Browning and Herrick, Journal of Extension, Dec 2014, Vol. 52(6), Article 6IAW3, 4pgs.).

The West Virginia Urban Agriculture Conference was a joint initiative by WVU Extension Service, WVSU Extension Service, and the Northeast Sustainable Agriculture Research and Education (SARE) program, in partnership with the Capitol & Elk Conservation

- 4) MOVE (Mid-Ohio Valley Growers Association) is an effort of trained ASPs to help further project outcomes, by helping to sustain agriculture in the region, and get fresh, high-nutrient produce into the hands of Mid-Ohio Valley residents.
- 5) The 'Small-Scale, Backyard Poultry Short-course, a hands-on agent to farmer training program that developed out of the WV-SARE PDP project, introduces an alternative enterprise opportunity for small producers. So far, this program has trained 256 producers in 12 counties, and has produced multiple training resources. A canned-module for this course is available on our website, for other agents to replicate.
- 6) Other canned-modules developed by the Project Team and trained ASPs include the 'Farm-to-School' module; the 'Ready for Market' Modules 1 and 2; and the 'Livestock Grazing School' module. These 'canned'-modules' are available on the WV-SARE for access by other ASP wanting to deliver these trainings for their clientele.
- 7) Increased requests from project participants for participation in NRCS's EQUIP program, FSA and Farm Credit loan program, the Farm-to-School Initiative, VC2's marketing and accounting services, Farmers Market Association, Specialty Crop Block Grant applications, etc.
- 8) More farm businesses have been registered through the WV Secretary of State's office, and more producers are learning the value of filing a Schedule F form as small operations on their income taxes. We saw more participants attending the West Virginia Small Farm Conference and looking for opportunities to sharpen their skills.
- 9) The WV Agritourism Initiative is a grant-funded project that arose out of the WV-SARE PDP initiative. ASPs and partnering agencies collaborated to deliver additional trainings for participants from the PDP project wanting to diversify into agritourism and farm-based educational operations.
- 10) Comments from ASPs: Several farmer participants have contacted ASP to relay how they have benefitted from the program. One example: One participant is now looking to diversify her operation and has contacted me about obtaining commercial dehydrators and seeking contacts for specialty products. Another has said that record-keeping helped her get through a recent IRS farm audit. Yet another said that she realized through her participation in this class that her current chicken tractor farming had not been a profitable approach to take and she plans to re-evaluate poultry production for profitability to her operation. Similar stories resonate throughout the state. We have heard comments such as "this course has been about much more than agriculture, it has been about life"; "if I knew then what I can understand now"; "this will certainly help change my business for the better";

‘finally I can see why I am losing money and how I can change that’.

11) Individual quotes:

- a. "It is helpful to meet and talk to other producers who struggle with the same or similar issues. Socially, many small-farmers feel isolated and this program can reduce or eliminate that."
- b. "Balancing farm, family, finances, and community; we face unique situations that are not often addressed through conventional trainings. This project is timely."
- c. "It is a welcome change to have different agencies speaking to us at the same time, on the same subject; often we hear different messages from different agencies at different times, which is utterly confusing for me as a producer. Nice partnerships."
- d. "I have attended several extension trainings and it the first time I have been introduced to whole-farm planning. This program has helped me see how actions in one part of my farm can affect the rest of my operation. We should have more programs like this that combine the production aspects of farming, with marketing and financial aspects. It was also good to interact and learn from other producers."
- e. "I so appreciate all you do for small farmers in WV. This class has given me the knowledge, skills and confidence to start my own aggregation and distribution business, with many of my fellow-participants being among my first customers. I can't thank you enough!"

Other Results, Unanticipated Outcomes and Interesting Finding

As above.

6. 2013-2014 SARE Outreach Activities

Event/Activity	Number of Contacts <i>(please enter your best estimate)</i>	
	Farmers	Ag. Professionals
Conducted 7 NESARE Outreach Sessions (Small Farms Conference, Farm Opportunity Days, Beef Short Course, Food Expo in Huntington, Sheep Short Course Day, Women in Agriculture Conference, Urban Agriculture Conference) - highlighted the SARE program and grant opportunities and educational materials available to producers and processors	More than 1,200	More than 150
NESARE-WVU Website http://www.nesare.org/State-Programs/West-Virginia and Facebook Account https://www.facebook.com/WVSARE	More than 3,000 visits and 497 lifetime likes	More than 3,000 visits and 497 lifetime likes
NESARE Partnership and Farmer Grant Writing Webinar (and follow-up activities)	More than 21	More than 14
“Keynote Address: Got Sustainability – Learning from the Past, Working in the Present, Planning for the Future” - Urban Agriculture Conference, Charleston, WV, April 12th, 2014.	More than 240	More than 50
SARE Outreach at WVUES Dinner Meetings – Highlighted opportunities and resources available from NESARE	More than 2,000	More than 25

7. Assessment of Project Approach /Lessons Learned/Future Recommendations

Reaching aspiring, beginning and experienced producers with new educational approaches and topics requires a fully engaged planning and implementation team, with the willingness to offer a variety of alternative learning formats. We owe our success to the hard-working efforts of the Project team and ASPs that helps us with the following:

- Providing a whole-farm planning educational approach using updated tools and technologies, and delivered in the interactive and conversational adult learners reported they prefer;
- We started with a 'train-the-trainer' to help deliver the entire course and all required materials in a consistent and high-quality standard;
- We then trained the producers and followed that with on-going coaching/mentoring assistance, to help 'hold producers hands' as they make adoption decisions;
- The Networking and partnership opportunities provided were designed to foster peer-learning, build confidence among beginning farmers, and share best practice;
- The 'Reading the Farm' field tours allowed participants to network and witness best practices at work;
- We built a cadre of local resource personnel and collaborators to provide on-going support for participants upon project completion;
- We developed a distance-education module to expand the project's audience; and
- We provided an updated and interactive project website as an additional resource, but also as a networking opportunity for participants.
- We partnered with related agencies to streamline educational programs and networking opportunities, for ASPs and farmers alike.