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Small Farm Source Book



Small Holder Planning Project September 2001





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Department of Urban and Regional Planning

Small Farm Source Book

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For

Small Holder Research Planning Project

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All links presented in this book can be accessed on the IFAS website at http://floridasmallfarms.ifas.ufl.edu/Small_farm_source_book.htm

Introduction

This source book is the culmination of a 10-month collaborative planning effort concerning the management of small rural holdings from a joint environmental-economic perspective. To date little information has been available to small landholders concerning the management of property of 5-50 acres as economic and ecological units. The planning project brought together landowners, resource and economic planners, and environmental groups to discuss economic, resource, and ecological problems faced by landowners in the north central and panhandle areas of Florida. The main objective of the planning project is to develop recommendations for research designed to build a body of knowledge for the management of smallholdings as economic and ecological units. The specific planning project objectives are to:

- Identify and evaluate key problems of small holders from the landholders' point of view and that of those in the public sector responsible for resource planning.
- Identify research issues for environmental conservation techniques suitable for the small landholder.
- Identify information requirements concerning potentially remunerative alternatives for small holders and catalogue and summarize relevant documents.
- Identify and evaluate economic and ecological opportunities and barriers for new and existing small farmers.
- Prepare a document that will summarize the findings of the planning project.

Regional meetings were held in Okaloosa County, Leon County and Columbia County. The main focus of the meetings was a discussion of specific problems and concerns faced by the landowners, resource and economic planners, and environmental groups in attendance. Attendees received a packet of information containing the alternatives included in this source book as well as information from the Southern Region Sustainable Agriculture Research and Education Project (SSARE). A wrap-up meeting was held in Leon County to provide attendees of previous meetings with an opportunity to comment on the overall planning process and the following source book that includes information for small farmers and concerned professionals. The ultimate goals of this project, and future research, is to assist small farmers to improve production and marketing of traditional and alternative agricultural and rural commodities, to improve awareness and communication between the concerned groups, and to generate greater choices for consumers.

Laura Miller-Regalado served as research assistant and project coordinator. Her invaluable assistance was funded through a research grant from SSARE. Project collaborators Dr. David Zimet (University of Florida Institute of Food and Agricultural Sciences, North Florida Research and Extension Center), Dr Ivonne Audirac (Florida State University, Department of Urban and Regional Planning), Dr. Alan Long (University of Florida, Institute of Food and Agricultural Sciences) and Dr. Michael Wetzstein (University of Georgia, Agricultural Economics) volunteered their time to the planning project. Extension agents assisted in publicizing the meeting information to farmers in their counties and in hosting the meetings in the three north Florida counties.

How to Use This Book

The information provided in this book was obtained from Internet sites. The links to the sites as well as phone and mail contact information are provided for each topic. This book can be used as a source of specific information or to locate additional information.

Issues Faced by Small Farmers and Rural Landowners

There were several common concerns voiced by project participants that can be broadly defined as: regulatory, marketing, and alternative production issues.

Regulatory Issues

Participants expressed concern over the lack of a central resource for information on regulatory issues. Presently, producers must contact the United States Department of Agriculture (USDA), Food Safety and Information Service (FSIS), United States Environmental Protection Agency (EPA), Institute of Food and Agricultural Sciences (IFAS), and other state and federal government agencies separately to obtain information relevant to their operation. Several of the attendees had trouble obtaining information in a timely manner. The general consensus among participants was that a central information-clearing house tailored to the small producer would be very helpful and time saving.

Producers feel that many of the regulations are outdated and should be reevaluated with respect to small farmers. One participant that has livestock stated that some of the livestock regulations are 100 years old. Many of the regulations make it difficult for the small producer to incorporate value-added and direct marketing into their operation.

Regulations and taxes also affect the competitiveness of Florida farmers as compared to Georgia or Alabama farmers. Agricultural regulations in other states are less rigorous than in Florida, making farming in Florida more difficult. For example, Georgia has an exemption on ad valorem taxes on farm equipment purchases that is not available in Florida.

Marketing Issues

Cooperatives were suggested as a solution to some of the regulatory problems and as a way to organize individual farmers for marketing purposes. Many of the farmers were not aware of cooperatives in their area and did not know about how to go about forming one. This is another area where a small farm information resource would be useful.

Several participants discussed alternative markets and marketing techniques. Community supported agriculture (CSA) is not common in this area. Participants explored reasons for this and possible ways to promote agricultural enterprises in their communities. Small farmers markets that cater to the small producer were suggested. Ones in operation such as the Saturday market on Park Avenue in Tallahassee and the Saturday Haile Plantation market in Gainesville were discussed. One participant mentioned new generation co-ops as an alternative to traditional cooperatives and suggested that they could function as umbrella organizations for individual farmers. CSA type cooperatives were also discussed. Participants expressed the need to know what types of CSA projects the community would support. A survey of local consumers was suggested as a way to gauge public support.

Participants discussed specific obstacles to marketing that the small farmer faces. Many of these are due to production problems that make it difficult for the small producer to guarantee a consistent supply that grocery stores and other outlets require. Producers also felt there is a lack of locations for selling their products. Again cooperatives were mentioned as a possible way to ensure production and provide enough variety to support a retail outlet and potential buyers.

Producers that have had success with alternative marketing techniques shared their experiences. Roadside stands, individual farmers markets, selling to schools, specialty stores, and to restaurants were some of the suggestions. One producer uses the Internet as a marketing tool in conjunction with a farmers market stand. This was of interest to many of the participants who were not familiar with the Internet or had not considered using Internet marketing.

Alternative Production

Many of the participants expressed a desire to supplement their income from traditional farming with alternative products and markets. Alternative production such as organic farming was discussed. Alternative products such as ethnic foods for niche markets were suggested as an option to traditional crops. Aquaculture and the problems with implementing a program, specifically permitting requirements, in Florida were also discussed.

Many of the participants expressed an interest in agricultural tourism as an addition to their traditional farming activities. Value-added processes were also discussed as a way to increase farm income. Specialty foods and alternative farming techniques were also mentioned.

Participating landowners expressed very little interest in considering nonfarming alternatives for their land such as the selling or transfer of development rights to a public or non-profit conservation agency. The main intent among participants was to remain in farming as long as possible and in full control of their property rights.

Agricultural Tourism

Agricultural tourism is the act of visiting a working farm or agricultural, horticultural or agribusiness operation for the purpose of enjoyment, education, or active involvement in the activities of the farm or operation. Agricultural tourism is already popular in England and is increasing in the United States. Consumers have more free time and are interested in "adventure travel" with authentic experiences. Some examples of agricultural tourism are:

- Farm stays
- Roadside stands
- U-pick or Pick-Your-Own operations
- Rural tourism
- Rent-a-tree operations
- Value-added
- Tubing
- Photography

Advantages:

- Increases the economic activity of the farm
- Can generate revenue by charging for visits as well as the sale of products
- Is a value-added enterprise in addition to normal farming operations
- Can be done on small scale and can extend the season
- Educates the public about agricultural and environmental issues

Disadvantages:

- Potential liability to farm owners if accidents occur that injure farm visitors
- Requires people with marketing skills
- Business is more of a front-line rather than back room operation
- Might have to be major focus of the business

Sources:

- University of California at Davis Small Farm Center
 <u>http://www.sfc.ucdavis.edu</u>
- University of Arizona Agricultural and Resource Economics
 <u>http://ag.arizona.edu/arec/pubs/dmkt/dmkt.html</u>
- Purdue University rural and agricultural tourism links http://www.ces.purdue.edu/RuralTRIP/websites.htm

University of California at Davis Agricultural Tourism Information http://www.sfc.ucdavis.edu

By Ramiro Lobo, Farm Advisor UC Cooperative Extension, San Diego County

Helpful Agricultural Tourism Definitions

Certified Farmers' Market (CFM): A location approved by the county agricultural commissioner, where certified farmers offer for sale only those certified agricultural products they grow themselves. Other agricultural and non-agricultural products may be sold at the markets depending on regulations and market rules.

Community Supported Agriculture (CSA): Partnership between consumers and farmers in which consumers pay for farm products in advance and farmers commit to supplying sufficient quantity, quality and variety of products. This type of arrangement can be initiated by the farmer (farmer directed) or by a group of consumers (participatory).

Direct Marketing: Any marketing method whereby farmers sell their products directly to consumers. Examples include roadside stands, farm stands, U-pick operations, community supported agriculture or subscription farming, farmers' markets, etc.

Farm Stays: The activity of visiting a farm for overnight stays and for the purpose of participating in or enjoying farm activities and/or other attractions offered.

Farm Visits: The activity of visiting a farm for short periods of time for the purpose of participating in or enjoying farm activities and/or other attractions offered.

Roadside Stands: Also known as farm stands, refers to any activity where the farmer sells agricultural and value added products from his farm directly to consumers at a stand or kiosk located on or near his farm or along a road near the farm.

U-Pick or Pick-Your-Own Operations: These are farms or



orchards where the customers themselves harvest the fruits or produce. The prices they pay for the volume harvested will be usually higher than what the grower would get from a broker.

Rural Tourism: Recreational experience involving visits to rural settings or rural environments for the purpose of participating in or experiencing activities, events, or attractions not readily available in urbanized areas. These are not necessarily agricultural in nature.

Rent-a-Tree Operations: These are arrangements where consumers rent or lease trees from farmers. The consumers pay the farmer at the beginning of the season, the farmer takes care of the trees and either the farmer or the customer will do the harvesting.

Value-Added: Any activity or process that allows farmers to retain ownership and that alters the original agricultural product or commodity for the purpose of gaining a marketing advantage. Value-added may include bagging, packaging, bundling, pre-cutting, etc.

Conducting Farm And Ranch Tours

Appropriate planning is essential if you want to present a positive image of your farm and of agriculture as a whole, and to be well prepared for a group visit. Farm tours should not, generally, be conducted in an ad hoc manner.

It is important to think about what kinds of images you want your visitors to take with them when they leave (impressions, experiences, knowledge, facts, products). Here are some

considerations to take into account when assessing your state of readiness for a farm tour:

- When is the best time of year for you to provide tours? Is the weather generally good at that time of year? Are unsightly chores like manure spreading or machinery cleaning occurring during that time?
- Will you charge a fee to offset the time and labor expended on the tour and to provide an economic Fall is a colorful time for farm tours return? If so, what will your fee schedule be?
- Will you offer products to eat at the end of the tour? If so, check with your local health department regarding regulations concerning your ability to feed guests.
- Can visitors safely tour your facility? Remember, safety is your responsibility!
- Is your farm relatively clean and in good repair? Do you practice good pest and waste management programs? Are you prepared to answer probing questions about your practices?
- Will your tour present a positive image of agriculture as a whole? Are there opportunities to demonstrate resource sensitivity, for example by providing habitat for wildlife such as hedgerows, ponds for waterfowl, etc.
- Is your farm accessible to persons with disabilities? If not, you may need to make this clear before the tour.



Provide a site for commemorative photo opportunities.

Preparation

Develop rules for photography. You need to decide whether visitors can take pictures of everything they see or only in certain areas. Consider providing a specific location for group/family commemorative photos where pictures can be



across the United States.

taken beside a farm sign, farm product, or some other piece of memorabilia.

- Be sure you have given adequate attention to hygiene. Assess the adequacy of your bathroom and hand washing arrangements, especially if visitors will be handling animals before they eat.
- Provide for adequate amounts and locations of garbage cans in the eating areas.
- Public Relations: Call your neighbors to let them know about the planned tour.
- Esthetics: Ensure that dead and injured animals or discarded products will not be on display during the tour or visible to your guests.

The Tour Schedule and Presentation

- Develop a tour program and a verbal presentation that can be modified to fit the interests and backgrounds of the audience.
- Post signs that clearly outline safety requirements.
- View your operation through the eyes of a visitor. Point out the obvious and explain the reasons behind specific operations.
- Emphasize a theme throughout the tour (for example, recycling, sustainable agriculture, food quality, animal welfare, agriculture and the environment, or conservation).
- Discuss your production systems, following the path of products from conception to consumption; from seed to tomato sauce, from cow to milk and cheese, from lamb to wool. Talk about the diverse markets your products serve, including by-products.
- Select three to five points of emphasis that you want to reinforce throughout the tour. What would you like guests to have learned by the end of your tour? Whenever possible, make it an interactive, hands-on, experience. For example: If you are touring an apple orchard, show pictures or point to trees in different stages of growth. Describe the production cycle. How much will the orchard will produce at peak yield (relate the yield to something your audience can understand, such as "as much as two children weigh"). Discuss why you grow apples here (soil, weather, and water). Describe the steps the product goes through before reaching the market. Explain the challenges and uncertainties you deal with when producing apples (pests, changing regulations, labor force issues, market). But don't bore your audience with your pet peeves. They are there for recreation, relaxation, and education.
- Have safe, organized, hands-on opportunities for children (touch the seeds, lambs, the warm pipelines in the milk barn and the cool milk tank, put feed samples in a bucket for touching, etc.). For younger children (pre-school to 3rd grade), use body language to accompany your verbal explanation to help them learn and keep them involved.
- How many people can you comfortably accommodate in a group and still conduct an effective tour? Practice the tour with other staff that will also be leading groups. Organize the tour so that different tour groups will not get mixed up.
- Practice the tour program with a person who is not involved in your operation and get their feedback.
- Walk your tour. Check off how long it takes. Is the terrain level and well drained?

Tour Contact

- Determine the general age and abilities of the members of the tour in terms of the approximate number of adults and children and why the group wants to visit your farm. Establish a comfortable ratio of chaperones to children and youth if you feel it is necessary.
- Discuss parking and provide directions to parking facilities.
- Suggest clothing that enhances safety, for example closed-toe, low heel shoes and comfortable clothing. Suggest people bring hats



Picnic facilities must be adequate if provided.

and sunscreen in the summer, and warm clothing in other seasons.

Discuss meals. Will the group be eating on your property? What will meals cost? Are • your picnicking facilities adequate, if that is an option?

Briefing the Group

- Greet your visitors on the bus if they arrive by bus. Some tour buses have a PA system that you might use to address your audience.
- Introduce yourself and firmly but politely establish expectations regarding conduct and behavior (appropriate for the age group).
- Remind visitors that your farm is a working, production-oriented operation, not an amusement park.
- Children should be advised to: walk, remember that rocks stay on the ground, stay with the group, be good listeners, and raise their hands when they have questions.
- Prepare visitors for regular farm environmental hazards such as odors, flies, dust or loud noises. However, to the extent that you can, take steps to mitigate these environmental irritants.

Conducting the Tour

- Walk at a pace appropriate to the group's size and age.
- Have a responsible person at the rear of the group to assist with keeping the group together.
- Discuss what the group will see before entering a noisy area.
- Children should be encouraged to repeat new words and concepts as you explain them.
- Be sure to explain any agriculture terms that may be foreign to your guests. Think of ways to relate concepts and terms to everyday life, for example, feeder mixer wagons are blenders on wheels, etc.
- Answer only questions about what you know and limit your comments to your farm. Avoid ideological debates with guests or customers.



Greet your guests when they arrive. If you are addressing a large group, consider using a microphone or the tour bus PA system

Concluding the Tour

- Allow plenty of time for questions.
- Review the main concepts you introduced and refer to the key theme(s). For children's groups, use a fill-in-the-blank method, encouraging the children to participate, thus reinforcing the information.
- Samples of the product (empty containers, pictures, or actual products) provide a great ending. Provide information on how/where they can purchase your product.
- Escort the group to the bus or parking area, thanking them for their visit. Encourage them to return.

Post-tour Review

- Ask for an evaluation from the tour contact. What did the visitors like? What would help the group to better assimilate the information? What suggestions do they have for improving the tour?
- Establish and update a file of these notes. Review this feedback with other tour staff before the next tour.

This Fact Sheet was produced by Desmond Jolly, Cooperative Extension agricultural economist and director, UC Small Farm Program; and Denise Skidmore, member of the Agriculture and Nature Tourism Workgroup, May 2000.

Top Marketing Ideas for Agricultural Tourism Operations

University of Arizona Agricultural and Resource Economics http://ag.arizona.edu/arec/pubs/dmkt/dmkt.html

By Mike Wetter, Consultant, Mike Wetter and Associates

- 1. Happy customers are the most important key to success. They will return, and they will tell their friends about your operation. Learn their names. Remember what they like and have it ready for them. Keep a database if you can't keep it all in your head. The little touches make all the differences.
- 2. Develop a mailing list. Get names from outdoor magazines, associations, and other sources of people that like outdoor activities. Your mailing list is your most important asset. Mail to your customers at least twice a year.

- 3. **People don't come to hunt or fish or ride a horse or tractor.** They come to have fun and relax. You are in the hospitality business; take care of your customers and you will succeed. Always ask your customers what they liked about their stay and what could be improved.
- 4. Cater to as "high end" a customer as you can and don't be afraid to charge for your service. This is not a volume business, so you can't go low-end and make money. If you target people with money and charge more for your service, people will expect more from you. You don't have to be "upscale", but you do need to offer a quality experience.
- 5. Take care of details. Make sure that your telephone is answered professionally ("Anderson Ranch" rather than "hello"). Your answering machine should have a professional message. Return calls promptly.
- 6. Let your neighbors know about you. Join the Chamber of Commerce, talk to gas station owners, cafes, Elk clubs, motels, and neighboring farms. Give people your brochure and make sure that people in your area know about you. Start close to home at first and move out gradually.



7. Send information about your company

to magazines and newspapers. Send them news releases and story ideas. Invite them out for a free stay. Follow mailings with personal calls. Think of things that will interest them.

- 8. Obtain brochures and literature from other operations that are similar to yours. See what they are offering and what it costs. Look at their brochures to see what you like and don't like. Improve your materials accordingly. Get addresses and phone numbers of operations from outdoor recreation magazines. Owners are generally willing to give you a half-hour of free advice. Call them and tell them you are just starting out and ask if you can have a few minutes of their time to ask some questions.
- 9. Advertise in the telephone book. Consider placing an ad in the Yellow Pages in target markets. Put signs on your property that are visible from the road. Make sure people can find you and have a way to contact you.
- 10. **Produce quality brochures and PR materials.** On brochures, less is more. Don't clutter it with lots of words. Use photos. Hire a graphic artist or get lots of feedback from other business people before you go to print. Don't use a photocopier. Color is costlier than a black and white brochure, but it shows a commitment to quality and attracts a lot more attention.

Direct Farm Marketing and Agricultural Tourism Information University of Arizona Agricultural and Resource Economics http://ag.arizona.edu/arec/pubs/dmkt/dmkt.html



Research & Publications

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Direct Farm Marketing and Tourism Handbook

This guide is designed to help farm and ranch operators (and other individuals who grow or process food products) market their products and services directly to the consumer.

You can access the guide online by following the links <u>below</u>. Please note that these pdf files require Acrobat Reader, which can be downloaded free from the <u>Adobe website</u>.

You may also order a hard copy of the guide for \$25.00. Quantities are limited; please email tronstad@ag.arizona.edu for ordering information.

The Table of Contents for this publication is shown for reference purposes.

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Direct Marketing Alternatives

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- 2. Direct Farm Marketing Options
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- 4. Quality Keeps Customers Coming Back to This Farm
- 5. Taste Preferences Outweigh Appearances of Apples
- 6. <u>Selling Organic Produce Poses New Challenges</u>
- 7. The Organic Market: Results from a Tucson Study
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- 2. Profile of Visitors to Fresh Farm Produce Outlets in Cochise County, Arizona
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Additional Resources

Alternative Crops and Livestock Types and Production

The interest in crop and livestock diversity is growing among producers as well as consumers. For producers, farm product price instability or changes in farm subsidies may be the reason. For consumers, dietary changes or a desire for specialty foods might be the driving force. Much of the demand for these products comes from ethnic or niche markets, generally supplied by a specialized wholesaler who deals in these products. Networking has been found by many producers to be the single most important factor in success with alternative products. Networking would include other friend producers, cooperative extension services, trade or grower groups and Internet resources. Examples of alternative crops would be Asian green vegetables (bok choy), exotic root crops (cassava), exotic fruits (sapotes), herbs and spices, fancy or hydroponics salads, and cucurbits (bitter melon). Examples of alternative livestock are ratites (ostrich, rhea, and emu), rabbits, free-range chicken or pasture poultry, and grass fed beef. There are also alternatives in aquaculture such as baitfish production.

Advantages:

- Alternative products can help to increase the income-based diversity of a farm by spreading the risks and broadening a farms base of operations.
- Alternative products can yield higher economic returns per unit than traditional products.
- Alternative crops can lengthen the growing season.
- There is research being done on industrial products that can be manufactured from alternative crops, which would provide more market alternatives for farm products.

Disadvantages:

- Information on alternative products is more limited than information on traditional crops and livestock.
- Farm diversification using alternative crops and livestock requires extensive research and planning. Some of the considerations are; available resources such as land, soil, and water; buildings and storage; labor; location; financial status; business management and marketing; entrepreneurial skills.
- Markets for alternative crops vary, but many are located in other countries or specific parts of the United States. Often standard marketing channels do not handle these crops, requiring research to establish the market.
- Producing alternative crops and livestock can be risky due to the limited market and increased risks of storage and transportation.

Sources:

General Sources are given due to the amount of information available at each site

- IFAS University of Florida Publications
- <u>http://edis.ifas.ufl.edu</u>
- Alternative Farming Systems Information Center
 Alternative Agriculture-Related Internet Sites and Documents
 <u>http://www.nal.usda.gov/afsic/afslinks.htm</u>
- Appropriate Technology Transfer for Rural Areas (ATTRA) <u>http://www.attra.org/attra-pub/</u>
- •

IFAS University of Florida Publications <u>http://edis.ifas.ufl.edu</u>

Alternative Crop Publications

Alternative Opportunities for Small Farms: Alligator Production Review Alternative Opportunities for Small Farms: Apple Production Review Alternative Opportunities for Small Farms: Bait Minnow Production Review Alternative Opportunities for Small Farms: Blackberry Production Review Alternative Opportunities for Small Farms: Blueberry Production Review Alternative Opportunities for Small Farms: Bulb Onion Production Review Alternative Opportunities for Small Farms: Bunch Grape Production Review Alternative Opportunities for Small Farms: Catfish Production Review Alternative Opportunities for Small Farms: Muscadine Grape Production Review Alternative Opportunities for Small Farms: Muskmelon Production Review Alternative Opportunities for Small Farms: Peach and Nectarine Production Review Alternative Opportunities for Small Farms: Pecan Production Review Alternative Opportunities for Small Farms: Pickling Cucumber Production Review Alternative Opportunities for Small Farms: Pumpkin Production Review Alternative Opportunities for Small Farms: Sod Production Review Alternative Opportunities for Small Farms: Southern Pea Production Review Alternative Opportunities for Small Farms: Watermelon Production Review Alternative Opportunities for Small Farms: Woody Plant Liner Production Review

Conservation Easements

A conservation easement is a voluntary agreement between a private landowner who donates the property as an easement, and a municipal agency or qualified non-profit corporation who receives the easement. The owner of the property deeds an interest in the land, known as a conservation easement, to the organization. The organization must then enforce the easement on the property in perpetuity. Conservation easements are generally used to preserve scenic view sheds, wildlife habitats, ecosystems, farmlands, or historic buildings or districts. The conservation easement restricts the use of the property in order to protect its conservation values. Conservation easements may be sold at full-market or below-market price or donated.

Advantages:

- If the conservation easement is donated or sold at below-market value then the landowner may qualify for a one-time income tax deduction in the year of the sale or donation. The land may also qualify for lower yearly property taxes and a lower estate tax valuation.
- The conservation easement can be tailored to fit the financial and personal needs of a particular landowner and the conservation needs of the particular property.
- The property continues to be owned by the original owner who can continue to live on it, sell it or leave it to heirs. Although the use is restricted by the terms of the easement, activities such as farming or public uses such as hiking or biking may be permitted.

Disadvantages:

- When a property owner sells or donates land as a conservation easement, they permanently give up many property rights. The rights that are retained by the property owner vary by agreement. Those that are limited might include: harvesting timber, building structures, and extracting minerals.
- When the property is sold or inherited, the new owner must adhere to the terms of the easement. This will include all restrictions on the land and might include management duties.
- While conservation easements provide excellent tax benefits to landowners in the short run, in the long run the value of the property is often reduced due to the restrictions.

Sources:

- Little Traverse Conservancy
 <u>http://landtrust.org/contactltc.htm</u>
- Florida Land Trust Alliance Directory
 <u>http://www.lta.org/findlandtrust/FL.htm</u>

Conservation Easement Frequently Asked Questions

From the Little Traverse Conservancy http://landtrust.org/contactltc.htm

What is a Conservation Easement?

A conservation easement is a voluntary agreement that allows a landowner to limit the type or amount of development on their property while retaining private ownership of the land. The landowner, who is the easement donor, and the Conservancy, who is the party receiving the easement, signs the easement. The Conservancy accepts the easement with understanding that it must enforce the terms of the easement in perpetuity. After the easement is signed, it is recorded with the County Register of Deeds and applies to all future owners of the land.

Another way to visualize a conservation easement is to think of owning land as holding a bundle of sticks. Each one of these sticks represents the landowner's right to do something with their property. The right to build a house, to extract minerals, to lease the property, pass it on to heirs, and allow hunting are all rights that the landowner has. A landowner may give up certain development rights, or sticks from the bundle, associated with their property through a document called a conservation easement.

Why do people grant conservation easements?

People grant conservation easements when they want to protect their property from unwanted development but also wish to retain ownership of their land. By granting a conservation easement a landowner can assure that the property will be protected forever, regardless of who owns the land in the future. An additional benefit of granting a conservation easement is that the donation of an easement may provide significant financial advantage to the donor.

What kind of financial advantages result from donating an easement?

Many landowners receive a federal income tax deduction for the gift of a Conservation Easement. The Internal Revenue Service allows a deduction if the easement is perpetual and donated "exclusively for conservation purposes." The amount of the tax deduction is determined by the value of the conservation easement. In addition, the donor may have estate and property tax relief.

What activities are allowed on land protected by an easement?

The activities allowed by a Conservation easement depend on the landowner's wishes and the characteristics of the property. In some instances, no further development is allowed on the land. In other circumstances some additional development is allowed, but the amount and type of development is less than would otherwise be allowed. Conservation easements may be designed to cover all or only a portion of a property. Every easement is unique and is tailored to a particular landowner's goals and the particular parcel of land.

Can the landowner still sell or give the property away?

The landowner continues to own the property after executing an easement. Therefore, the owner can sell, give or lease the property, as before. However, all future owners assume ownership of the property subject to the conditions of the easement.

Does the public have a right of access to easement-protected property?

The public does not have access to property protected by an easement unless the original landowner who grants the easement specifically allows it. Most easement donors do not want, and therefore do not allow, public access to their property.

How long does an easement last and who upholds it in the future?

To be eligible for a federal income tax deduction the easement must be "perpetual," that is, it must last forever. The Conservancy monitors the property, generally once a year, to assure that the easement is not being violated. If the easement has been breached the Conservancy will take whatever steps are necessary to uphold the terms of the easement, including taking legal action. Because of this obligation the Conservancy asks all easement donors to make a financial contribution to the Conservancy's Endowment Fund. This fund ensures long-term monitoring and enforcement of every easement the Conservancy receives.

Who owns the conservation easement?

To qualify for a tax deduction the easement must be donated to the government or a qualifying conservation or historic preservation organization.

Who owns and manages easement-protected lands?

The landowner retains full rights to control and manage their property within the limits of the easement. The landowner continues to bear all costs and liabilities related to ownership and maintenance of the property. The Conservancy monitors the property to ensure compliance with the easement's terms, but it has no other management responsibilities and exercises no direct control over other activities on the land.

Does the easement have to cover all of the landowner's property?

No, some easements cover only a portion of the landowner's property. Again, it depends on the landowner's wishes. For example, if someone owns 80 acres, of which 35 acres are wetlands, the landowner may decide to restrict development only on these 35 acres. The remaining 45 acres would not be covered or affected by the easement.

What kind of land can be protected by conservation easements?

IRS regulations require that the property have "significant" conservation values. This includes forests, wetlands, endangered species habitat, beaches, scenic areas and more. The Conservancy also has its own criteria for accepting easements. At the invitation of the landowner Conservancy staff will evaluate the property to determine whether it meets these Conservancy criteria.

How to Contact the Little Traverse Conservancy

Mailing address: Little Traverse Conservancy 3264 Powell Road Harbor Springs Maryland Phone (213) 347-0991 Fax (231) 347-1276

Email Address: marykay@landtrust.org

Florida Land Trust Alliance http://www.lta.org/findlandtrust/FL.htm

*LTA indicates Sponsor Member of LTA

*S&P indicates adoption of <u>LTA's Standards & Practices</u>, guidelines for responsible and ethical operation of a land trust.

Organization Name	Located in:	Operates in:
Alachua Conservation Trust	Gainesville, FL	FL
Apalachee Land Conservancy *LTA *S&P	Tallahassee, FL	FL
Barrier Island Trust	Tallahassee, FL	FL
Bay County Conservancy *S&P	Panama City, FL	FL
Calusa Land Trust and Nature Preserve of Pine Island *LTA	Bokeelia, FL	FL
Conservancy of Southwest Florida *S&P	Naples, FL	FL
CREW Land & Water Trust	Fort Myers, FL	FL
Florida Keys Land and Sea Trust *LTA	Marathon, FL	FL
Florida Trail Land Trust, Inc. *S&P	Gainesville, FL	FL
Florida's Nature Coast Conservancy *LTA	Cedar Key, FL	FL
Friends of the Scrub	Melbourne, FL	FL

Gasparilla Island Conservation & Improvement Association, Inc.	Boca Grande, FL	FL
Green Horizon Land Trust *LTA *S&P	Lake Wales, FL	FL
Gulf Coast Conservancy *LTA *S&P	Aripeka, FL	FL
Indian River Land Trust *S&P	Vero Beach, FL	FL
Land Preservation Trust of Palm Beach County *S&P	West Palm Beach, FL	FL
Land Trust of Dade County *S&P	Miami, FL	FL
Lemon Bay Conservancy, Inc. *LTA	Englewood, FL	FL
Longboat Key Conservation Trust	Longboat Key, FL	FL
<u>Martin County Regional Land Trust</u> *LTA *S&P	Stuart, FL	FL
Myakka Land Trust	Sarasota, FL	FL
North Florida Land Trust *LTA *S&P	Ponte Vedra Beach, FL	FL
Northwest Marion Land Trust *LTA *S&P	Micanopy, FL	FL
Orange-Seminole Land Trust	Orlando, FL	FL
Osceola Land Trust	Kissimmee, FL	FL
Panhandle Land Conservancy	Destin, FL	FL
<u>Red Hills Conservation Program/Tall Timbers</u> <u>Research, Inc.</u> *LTA *S&P	Tallahassee, FL	FL
Redland Conservancy	Miami, FL	FL
<u>Regional Land Trust for the Indian River</u> Lagoon	Melbourne, FL	FL
Sanibel-Captiva Conservation Foundation	Sanibel, FL	FL
Southwest Florida Land Preservation Trust	Naples, FL	FL
<u>The Nature Conservancy, Florida Field Office</u> *LTA	Altamonte Springs, FL	FL
<u>Trust for Public Land, Southeast Regional</u> <u>Office</u> *LTA	Tallahassee, FL	FL
Volusia County Land Trust	Daytona Beach, FL	FL
National Land Trust Alliance Office: Land Trust Alliance 1331 H St. NW Suite 400		

Washington, DC 20005 (202) 638-4725

Farm Direct Marketing

Farm direct marketing is one way for the small producer to compete in today's more competitive market. Producers sell directly to consumers, rather than paying packers, shippers, and brokers to market their crop. Farm direct marketing includes any farm with a built-in marketplace or marketing activities that the producers conduct for themselves. Some examples of direct farm marketing are:

- Community Supported Agriculture (CSA)
- U-Pick or pick-your-own operations
- Roadside stands
- Farmer's markets
- Rent a row or rent a tree operations
- Mail order operations
- Delivery service to restaurants and marketplaces

Advantages:

- Direct farm marketing results in cash sales, immediate payment and more control over your product pricing.
- Consumers can expect a fresher product, more personal attention and the experience of supporting a local farmer.
- Farm direct markets provide people with a connection to their foods' origins.

Disadvantages:

- Direct farm marketing is a potential liability to farm owners if accidents occur that injure visitors.
- Direct farm marketing requires intensive research and market analysis, as well as marketing skills.
- There may be zoning restrictions to such an operation.
- The farm's location is critical if consumers must come to the farm.

Sources:

- Alternative Farming Systems Information Center, Defining Community Supported Agriculture <u>http://www.nal.usda.gov/afsic/csa/csadef.htm</u>
- Rural Radio Resource Pack, Niche Marketing http://www.new-agri.co.uk/cta/english/97-3.htm
- The University of Arizona Cooperative Extension Direct Farm Marketing and Tourism Handbook http://ag.arizona.edu/AREC/pubs/dmkt/dmkt.html
- See the Direct Farm Marketing and Tourism Handbook under Agricultural Tourism on page 14. and Marketing Specialty Forest Products under Forestry Alternatives on page 33 of this source book.



http://www.nal.usda.gov/afsic/csa/csadef.htm

Defining Community Supported Agriculture

An EXCERPT from Community Supported Agriculture (CSA): An Annotated Bibliography and Resource Guide by Suzanne DeMuth USDA, National Agricultural Library, September 1993

"Since our existence is primarily dependent on farming, we cannot entrust this essential activity solely to the farming population-- just 2% of Americans. As farming becomes more and more remote from the life of the average person, it becomes less and less able to provide us with clean, healthy, lifegiving food or a clean, healthy, lifegiving environment. A small minority of farmers, laden with debt and overburdened with responsibility, cannot possibly meet the needs of all the people. More and more people are coming to recognize this, and they are becoming ready to share agricultural responsibilities with the active farmers." (1)

Community supported agriculture (CSA) is a new idea in farming, one that has been gaining momentum since its introduction to the United States from Europe in the mid-1980s. The CSA concept originated in the 1960s in Switzerland and Japan, where consumers interested in safe food and farmers seeking stable markets for their crops joined together in economic partnerships. Today, CSA farms in the U.S., known as CSAs, currently number more than 400. Most are located near urban centers in New England, the Mid-Atlantic states, and the Great Lakes region, with growing numbers in other areas, including the West Coast.

In basic terms, CSA consists of a community of individuals who pledge support to a farm operation so that the farmland becomes, either legally or spiritually, the community's farm, with the growers and consumers providing mutual support and sharing the risks and benefits of food production. Typically, members or "share-holders" of the farm or garden pledge in advance to cover the anticipated costs of the farm operation and farmer's salary. In return, they receive shares in the farm's bounty throughout the growing season, as well as satisfaction gained from reconnecting to the land and participating directly in food production. Members also share in the risks of farming, including poor harvests due to unfavorable weather or pests. By direct sales to community members, who have provided the farmer with working capital in advance, growers receive better prices for their crops, gain some financial security, and are relieved of much of the burden of marketing. Although CSAs take many forms, all have at their center a shared commitment to building a more local and equitable agricultural system, one that allows growers to focus on land stewardship and still maintain productive and profitable small farms. As stated by <u>Robyn Van En [1948-1997]</u>, a leading CSA advocate, "...the main goal...of these community supported projects is to develop participating farms to their highest ecologic potential and to develop a network that will encourage and allow other farms to become involved." (2) CSA farmers typically use organic or biodynamic farming methods, and strive to provide fresh, high-quality foods. More people participate in the farming operation than on conventional farms, and some projects encourage members to work on the farm in exchange for a portion of the membership costs.

Most CSAs offer a diversity of vegetables, fruits, and herbs in season; some provide a full array of farm produce, including shares in eggs, meat, milk, baked goods, and even firewood. Some farms offer a single commodity, or team up with others so that members receive goods on a more nearly year-round basis. Some are dedicated to serving particular community needs, such as helping to enfranchise homeless persons. Each CSA is structured to meet the needs of the participants, so many variations exist, including the level of financial commitment and active participation by the shareholders; financing, land ownership, and legal form of the farm operation; and details of payment plans and food distribution systems.

CSA is sometimes known as "subscription farming," and the two terms have been used on occasion to convey the same basic principles. In other cases, however, use of the latter term is intended to convey philosophic and practical differences in a given farm operation. Subscription farming (or marketing) arrangements tend to emphasize the economic benefits, for the farmer as well as consumer, of a guaranteed, direct market for farm products, rather than the con- cept of community-building that is the basis of a true CSA. Growers typically contract directly with customers, who may be called "members," and who have agreed in advance to buy a minimum amount of produce at a fixed price, but who have little or no investment in the farm itself. An example of one kind of subscription farm, which predates the first CSAs in this country, is the clientele membership club. According to this plan, which was promoted by Booker Whatley in the early 1980's, a grower could maintain small farm profits by selling low cost memberships to customers who then were allowed to harvest crops at below-market prices.

(1) Trauger M. Groh and Steven S.H. McFadden, Farms of Tomorrow. Community Supported Farms, Farm Supported Communities. Kimberton, PA: Bio-Dynamic Farming and Gardening Association, 1990. p. 6

(2) Robyn Van En, Basic Formula to Create Community Supported Agriculture. Great Barrington, MA, 1992. Summary [p. 57].

Addendum October 1999

Robyn Van En [1948-1997] co-founded CSA in the United States in 1985 and served as director of CSA North America.

See also "Eating For Your Community," by Robyn Van En. <u>In Context</u>, Number 32, Fall 1995, Page 29. Langley, WA: Context Institute, copyright 1995.

This CSA web page is sponsored by:

- The Alternative Farming Systems Information Center at the National Agricultural Library
- <u>The Sustainable Agricultural Network</u>-- the National Communications and Outreach arm of the USDA Sustainable Agricultural Research and Education Program (SARE)

Visit our <u>Community Supported Agriculture</u> Web Site to learn more about CSA. Resources include a state-by-state CSA farm listing, related organizations, bibliographic references, related Web Sites, research projects, and competitive grants for farmers and ranchers.



The Alternative Farming Systems Information Center <u>afsic@nal.usda.gov</u>, <u>http://www.nal.usda.gov/afsic/</u> Page URL - http://www.nal.usda.gov/afsic/csa/csadef.htm, October 25, 1999

Photo by Scott Bauer. Source: Agricultural Research Service Image Gallery, http://www.ars.usda

Rural Radio Resource

http://www.new-agri.co.uk/cta/english/97-3.htm

Niche marketing

Introduction

Niche marketing is a new phrase but the actual concept is as old as man's trading history. In a nutshell, it is seeing where there is a gap in the market and supplying it. However, the marketplace is constantly evolving: consumer demands fluctuate, their tastes change, and trade regulations shift the goal posts so that producers often find themselves participating on a less than level playing field. To survive, and hopefully even to thrive, farmers and processors have to develop the will and the capacity to seek, recognize and exploit those gaps in the market, which they are in a position to fill. This requires a change in perception, access to information, and available resources to develop and market new products.

Understanding market requirements

Producers, particularly smallholder farmers, may initially feel reluctant or ill-prepared to tackle all the requirements of exploiting gaps in the market whether these are local, national or even international. It will require farmers to master market research in order to grow a sufficient quantity of a crop or preferred variety, of a given quality, to be delivered during a specific period of the year. Depending on how wide their horizons are they may also have to master export procedures and import regulations. Processors will have to meet many of the same challenges, though further down the food chain. Those operating at modest levels may again feel overwhelmed by the prospect of identifying and servicing distant markets. Most producers and processors will succeed only if they form groups and pool their resources in order to exploit these modern market demands.

Niche markets have often been associated with supplying the demands of the export market but there are plenty of home-based opportunities to be exploited. There are two important areas which are often overlooked or neglected: supplying the indigenous market needs and supplying resident and visiting expatriates with well grown and selected products of local and exotic origin. Introducing tourists and business visitors to local dishes is also the first step in creating an overseas demand for local produce and products when the visitor returns home.

However, in many countries where it would be quite possible to provide locally grown produce the visitor instead finds himself 'treated' to the same produce that he would have back in his own country. This is not only a wasted opportunity to provide home-grown produce but is expensive in terms of scare foreign exchange being used to import produce that could very easily have been grown at home, both for local and tourist consumption. This is particularly true in the Caribbean where 40 cents of every dollar earned through tourism is then spent on importing foods that could have been grown and processed locally. After all, as one Caribbean Minister of Agriculture put it "a dollar saved (on imports) is a dollar earned."

Meeting market requirements

Identifying a gap in the market that is waiting to be filled is an individual farmer or a group's starting point. However, knowing there is a need, and fulfilling all the requirements, is very different things. If a farmer or group of farmers set themselves up to fulfill a particular gap in the market, what they must ensure in order to keep their customer loyalty is a regular, reliable supply of produce of a consistently good quality. If they fail even once to turn up with goods that were expected or submit goods of inferior quality on the assumption that anything is better than nothing, they will lose their competitive edge. Customer loyalty is often fickle and if traders are once given the excuse to look around for a seemingly better deal, they will take it. And, there are always a person waiting on the sidelines to step in and take over from someone who has prepared the ground for them. It is then twice as difficult to break back into the market place once credibility has been lost.

It is often easier for a group or association, rather than an individual farmer, to fully exploit a perceived gap in the market. Economies of scale come into play in the volume of produce that

may be required at a price that gives both producer and trader a fair return. A group can more easily obtain the credit or afford the investment in, for instance, purchase of inputs, a lorry for transportation or machinery for processing to add value to their produce. As a group farmers can also obtain help more easily from the extension services, research establishments, Non-Governmental Organizations (NGOs), and donors when seeking advice on appropriate technology, marketing or any other aspect to do with their field of endeavor.

Further potential

There are two specific market 'gaps', which in most countries provide many more opportunities to be exploited further. One is the area of organic produce and the other is in the packaging of processed products.

It is not just in the developed world where 'green' issues are becoming of greater concern. Most urban consumers are now aware of the overuse and misuse of chemicals and are concerned about the 'purity' of the produce they buy. David Kwado farms three quarters of hectare just outside the town of Kumasi in Ghana. He grows mostly cabbage, okra and green pepper. Five years ago he made the switch from inorganic to organic farming. The reason was simple: he remembered back to his childhood when his parents farmed organically how good the food tasted and how well it keep. Over a period of years on his own farm, with heavy dependence on artificial inputs, he noticed that his yields actually declined over time and the produce did not taste so good or keep so well. He uses chicken manure to fertilize and improve the structure of the soil, which has gone from being heavy to sandy-loam and he uses neem against pests. He says his yields are better, and that neighboring farmers are noticing the difference and asking advice. But more importantly, he is now sought out by the market mammies and is paid a higher price for his produce because the traders recognize and value the superior quality, which in turn is in high demand by their customers. David Kwado knows that unless he expands or persuades others to join him, soon he will not be able to supply the increased demand.

. Here there are two different areas involved. Firstly, there is the straightforward area of everyday packaging of fresh produce using string bags. These very often use imported oil-based materials, polypropylene, even though the bags themselves may be woven in country. With a little adaptation, those same machines can be used to make bags from locally grown fibers such as sisal and kenaf. These fiber crops make a good cash crop for small-scale farmers, and because of their bushy nature can be grown as hedges on the margins of their land and so, in addition, help to protect other crops from wind and soil erosion.

Packaging processed products is another important 'gap' that can be exploited further. Consumers are always drawn to products that have been attractively packaged - from jam and honey to dried fruit, herbs and spices. Imaginatively packaged goods in addition to attracting local consumers have an additional sale outlet to expatriates who are working in the country or tourists seeking something indigenous to take home to friends and family as presents, or for themselves to remind them of their visit. These goods can often provide the first 'taste' to a potential export market. Again, very often the packaging itself can be made out of local materials e.g. cotton bags for wrapping locally produced soap, coffee, tea, herbs and spices.

What does the future hold

There is no doubt that 'gaps' in the market will continue to emerge. As more people in developed countries travel and develop tastes for new and unusual products a demand is created that will continue to grow. Meanwhile, liberalized economies also open up the market place to greater variety for the home consumer and it should, in time, create a good primary agricultural base for everybody. The rewards will go to those who have the imagination to see the need and who have the determination and the business skills to offer something original to their customers.



Reporting Agriculture for the 21st Century

http://www.new-agri.co.uk/

Forestry Alternatives

Long-term timber production is the most commonly thought of forestland management practice. However, many landowners could benefit from additional shorter-term economic returns. There are several enterprises that a landowner can combine with traditional forestland management to diversify their operation.

- Forest grazing
- Hunting leases
- Pine straw
- Fee fishing
- Firewood
- Christmas tree production
- Forest farming of special forest products or non-timber products

Advantages:

- Several different enterprises can be combined on one piece of land to increase the income-based diversity of the farm.
- Incorporating alternatives allows revenues to be generated while a forest stand is maturing to marketable size.
- Several of the alternatives require minimal time or money investment from the landowner.
- Several of the alternatives can actually improve the land by preventing fires and removing trees or underbrush that might interfere with the growth of the timber trees.

Disadvantages:

- Adding enterprises in general, requires considerable planning and market analysis.
- Management responsibilities will increase in order to maximize profits for each of the enterprises.
- Several of the alternatives rely on specialized or niche markets that fluctuate with consumer demand.
- Some alternatives may negatively affect the native wildlife.

Sources:

- Alternative Enterprises for Your Forest Land University of Florida IFAS <u>http://www.sfrc.ufl.edu/Extension/pubtxt/cir810.htm</u>
- Marketing Specialty Forest Products, University of Minnesota Extension <u>http://www.extension.umn.edu/distribution/naturalresources/DD7278.html</u>
- USDA National Agroforesty Center <u>http://www.unl.edu/nac/afnotes/ff-1/index.html</u>
University of Florida, IFAS <u>http://www.sfrc.ufl.edu/Extension/pubtxt/cir810.htm</u> Alternative Enterprises for Your Forest Land, Mary L. Duryea, Editor

Introduction by Mary L. Duryea

In the past, managing your forest land usually meant managing the trees to produce the maximum amount of wood mass for a given pulp or saw timber species. However, in addition to managing for these timber products, there are other enterprises that can diversify a forest resources management program and also may provide financial return to the landowner. In this publication we highlight six of the major enterprises that the landowner might incorporate into a forest resource management scheme. These enterprises include forest grazing, Christmas trees hunting leases, pine straw, fee fishing and firewood.

Why add other enterprises to your land? Timber is a long-term investment with returns available only after 20 or more years. In many circumstances additional, shorter-term income from the forest land would be beneficial. For instance, a grazing lease on the land might provide additional income during the early years of a plantation. In other cases, other enterprises might be added for aesthetic reasons or as a hobby. Persons who love wildlife and/or hunting might want to manage parts of their forest land for wildlife. Many landowners might want to manage their land for several products at once, resulting in a mosaic of different enterprises.

Adding and managing a successful forest resource enterprise, like any other business, involves planning and decision-making prior to its establishment and throughout the life of the enterprise. Some of the general steps that need to be followed to successfully begin and manage an alternative enterprise are:

- 1. Define your objectives and level of involvement in the enterprise that you desire.
- 2. Investigate the marketing potential of the product/enterprise in your area.
- 3. Investigate the biological and management potential of carrying out this enterprise on your land.
- 4. Identify any major factors (for example, financial, taxation, marketing, labor), which may limit the success of your forestry enterprise.
- 5. Decide what kind of assistance you need to begin and manage this enterprise; for example, financial, taxation, legal, forestry, and marketing assistance.
- 6. Plan the enterprise with professionals; for example, a certified public accountant, professional forester, attorney-at-law, etc.
- 7. With the help of professionals, develop a written management plan for your new enterprise.
- 8. Always consider safety as an important component of your forestry enterprise.
- 9. Develop a timetable for implementing your new enterprise.
- 10. Keep good records at every phase of the establishment and management of the enterprise.

The purpose of this circular is to describe some alternative enterprises in addition to timber for your forest land. Each enterprise is addressed individually in the following format:

- 1. Introduction What is the enterprise and what is its purpose?
- 2. Steps for adding each enterprise
- 3. Costs and Returns for the enterprise
- 4. Advantages and Disadvantages of managing for this enterprise
- 5. Conclusions

At the end of the circular, we provide a list of publications to obtain additional information on enterprise.

University of Minnesota Extension Service

http://www.extension.umn.edu/distribution/naturalresources/DD7278.html



By Clyde Vollmers and Erik Streed

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Which came first, the chicken or the egg?

The answer to this age-old adage often depends on the context of the question. With specialty forest products or "SFPs" (medicinals and botanicals, forest-based food products, or handcrafts and florals), the question becomes: which came first, production or marketing? Do you produce the product so you have something to market, or do you market the product so you have something to produce?' To make money with specialty forest products, the answer is clear-marketing comes before production. This may seem backward, but focusing on marketing before and during production will help determine what and how much to produce-thus giving the producer more control in setting the final price of the product. That translates into profit!

Since marketing is so crucial to an SFP business. it follows that good marketing can make a

business successful, and bad marketing will almost always result in failure. This fact sheet outlines successful strategies for marketing SFPs.

Markets for Specialty Forest Products

Markets for SFPs are often very different from markets for more common agricultural products. SFP markets can be:

- Specialized Most markets for SFPs are "niche" markets-which means they are small, very specialized, and with only a few buyers.
- Seasonal. This is true for production (nuts, berries, or mushrooms) and consumption (nuts or Christmas boughs). This means production labor is highly concentrated and that products may need to be stored for months.
- Risky. Products such as mushrooms and berries are highly perishable. This increases costs and risks for storage and transportation between the producer and consumers.
- **Proprietary.** Producers can be individualistic. They may be reluctant to share their sources of product, methods of production, and potential markets. This can make it difficult for newcomers to enter the industry.



Value-added Processing with Specialty Forest Products

Traditionally, most agricultural producers sold unprocessed products. However, during the past decade, we have witnessed a rapid expansion of further processing by producers to add value to the product. In North Dakota, farmers have started selling pasta rather than wheat. South Dakota farmers add value to soybeans at their solvent extraction plant in Volga. Corn farmers are profiting by turning corn into corn sweeteners and ethanol.

The first step in developing a value-added marketing campaign is to determine the feasibility of adding value. Certainly, there is little chance of adding significant value to products sold to pharmaceutical companies such as goldenseal, ginseng, or herbs. Mushrooms, nuts, and berries can be processed into candies, syrups, jellies, wines, etc. Even packaging can be a way of adding value. Mushrooms can be canned to prolong shelf life, and nuts can be attractively packaged so they are valued as a food and as a gift. This is adding value to your product.

The second step in deciding if you could profit by adding value to your product is to determine the volume of product you would need to produce. To determine the optimal volume, answer these questions:

- Do you have the financial support for facilities, equipment, operations, and inventory? And do you have enough financial support to allow for a bad year during the first years of operation?
- Can you produce or obtain enough product to have competitive costs? Building a very small plant in an industry served by large plants will result in failure. Further, can you produce enough product to fund your business near capacity?

Creating a Successful Marketing Campaign for Value-added Products

A key aspect of value-added marketing is developing an advertising campaign that informs customers about your products and the value you have added to the product. To do this, consider the following:

Who Is Your Customer?

To better serve customers and meet their needs, you need to know who they are. People can be divided into two groups: nonusers, light users, and heavy users. According to a rule of thumb, heavy users make up about 20% of the population but purchase 80% of our product.

To market effectively, you need to know the characteristics of the users of your product. For instance, what are their age, sex, income, marital status, occupation, family size, social class, and lifestyle? Different words and messages are used to sell to different people and markets. Older people respond differently than younger folks, and men respond differently than woman.



A key aspect of value-added marketing is developing an advertising campaign that informs customers about your products and the value you have added to the product.



What Benefits Are Your Customers Seeking?

People do not buy products! They buy solutions to their problems. They buy things to meet their needs. They buy benefits! Your marketing campaign should focus on the benefits your customers will receive from your SFPs. This is the old "sell the sizzle, not the steak" concept. Rather than stressing that a product is organic, stress the benefits provided by organically grown products (e.g., fewer chemicals results in better health and a cleaner environment). Rather than saying "made from woods-grown berries," on the package say, "made from the more flavorful woods-grown berries."

Role of Advertising and Packaging in Marketing Specialty Forest Products

Many customers get their first impression of a product from your packaging and marketing literature. That first impression is that if your SFP is of high quality, your advertising needs to reflect that quality. Many marketers of SFPs are tempted to make their own advertising and packaging material, but unless you are exceptionally talented or experienced in this area, you are probably better off hiring a professional. This can be expensive, but it is usually money well spent. Effective marketing materials and/or packaging for SFPs address the following criteria.

Good advertising and packaging has lots of white space. Focus on the key points and do not try to say everything. Generally, you want to share a few key benefits--the three to five that are the most important to your customer. Listing more may only confuse customers. Focus on what is really important to the customer and develop it fully.

Ideally, four-color printing with color separation should be used. However, this process can be very expensive. As an alternative, a high-quality paper with one or two color printing can also look great if properly designed (this publication is an example). Frequently marketers try to save money by using brightly colored paper, but this usually comes across as "cheap." Single color printing is very effective with quality paper. Light shades of grays, tans, and blues create a rich look. You can also use a heavier or slightly more expensive paper to enrich the look of a single color printing.

If a picture is worth a thousand words, in advertising it is worth several thousand. The best pictures show products in use. Be creative! Photographs become more difficult in one-color printing, and sketches or black and white photos might work better.

While most of us write rather long sentences, good advertising uses newspaper-style writing, i.e. short sentences! Never use 20 or 30 words in a sentence. Use 5 to 15 words. Use action verbs. Action verbs are exciting and interesting to read. Passive verbs are boring.

A quick test for good advertising is to look at personal pronouns. Good advertising uses a lot of "you" and "yours." Bad advertising uses "we," "our," and the name of the company. Focus on the need of your customer and how you fill it.

If you are marketing directly from your home, you will want to put up a road sign identifying your location and the product you sell. When designing road signs, remember that fancy typeface cannot be read at 60 miles per hour. Secondly, choose your colors carefully. Don't use green if the sign is surrounded by foliage, even if green is your favorite color. Drive around and look at other signs. Which are easiest to read and which stand out from the greatest distance? Always consider the setting. Signs that stand out in a highly wooded area may not work on the prairie.

Although this information cannot guarantee that your SFP business will be a success, it will prevent many unnecessary mistakes and allow you to put your time, energy, and resources where they are needed most. This makes it easier to meet the challenges of an SFP business, and hopefully the rewards will be much greater as well.



For More Information

Information on producing and marketing specialty forest products available from:

University of Minnesota Extension Service

The Center for Integrated Natural Resources and Agricultural Management (CINRAM) at the University of Minnesota at 612-624-7418 or 624-4299, fax: 612-625-5212, or email CINRAM@forestry.umn.edu

Minnesota Department of Natural Resources Division of Forestry Forest Product Utilization and Marketing 500 Lafayette Rd. St. Paul MN 55155-4404.

Additional Reference Sources

Proceedings of the North American Conference on Enterprise Development Through Agroforestry: Farming the Agroforest for Specialty Products, held in Minneapolis, MN, October 4-7, 1998.

Income Opportunities in Special Forest Products: Self-Help Suggestions for Rural Entrepreneurs. USDA Forest Service, Agricultural Information Bulletin 666, Washington DC, by Margaret and David Schumann. May 1993

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USDA National Agroforestry Center http://www.unl.edu/nac/afnotes/ff-1/index.html

Forest Farming: An Agroforestry Practice

Introduction

Most public and private forest lands of North America have been modified to varying degrees from years of human activity. Certain high-value 'non-timber forest products' have been over-exploited and are difficult to find. Forest farming practices can be used by private enterprise to grow desirable non-timber forest products on private lands, to supplement family income and to

allow biodiversity to reestablish within forests. In forest farming, high-value specialty crops are cultivated under the protection of a forest canopy that has been modified to provide the correct shade level. Crops like ginseng, shiitake mushrooms and decorative ferns are sold for medicinal, culinary or ornamental uses. Forest farming provides income while high-quality trees are being grown for wood products.



Definition

Special forest products (SFPs) or non-timber forest products (NTFPs) are high-value specialty product

items derived from green plants, fungi, invertebrates and other organisms that inhabit forested areas.

These products fall into four general categories.

- Food (e.g., mushrooms and nuts)
- Botanicals (e.g., herbs and medicinals)
- Decoratives (e.g. floral greenery and dyes)
- Handicrafts (e.g., baskets and wood products)

Concepts and Principles

In forest farming practices, high-value specialty crops are intentionally cultivated under the protection of a forest overstory that has been modified and managed to provide the appropriate microclimate conditions. Typically, these systems are established on private land by thinning an existing forest or woodlot to leave the best crop trees for continued wood production and to create the appropriate conditions for the understory crop to be grown. Then, the understory crop is established and intensively managed to provide short-term income.

Planning and Design

A forest farming practice is usually a small area of land (5 acres or less) whose vertical, horizontal and belowground dimensions are managed intensely to produce multiple crops simultaneously. Systems usually focus on a single SFP plus timber, but can include several products. Examples of systems include:

- Ginseng + maple syrup + bee products + timber
- Shiitake mushrooms + timber
- Ferns + beargrass + mushrooms + timber
- Ginseng + walnuts + black walnut veneer logs

The amount of light in the stands is altered by thinning, pruning or adding trees. Existing stands of trees can be intercropped with annual, perennial or woody plants. Compatibility among understory and overstory plants and cultural methods is essential.

Before investing time and money in growing a particular SFP, an entrepreneur needs to:

- Obtain production and processing information
- Locate a source of technical expertise
- Locate or develop potential markets

A common problem with developing an enterprise around a new product is the scarcity of technical information. Sources of expertise for producing SFPs can be obtained from state forestry and conservation agencies, the Cooperative Extension Service in county offices or state universities, the Natural Resources Conservation Service and the USDA Forest Service. A market analysis and business plan is essential before starting an enterprise. The existence and type of market depend on the SFP. Markets are often local stores or cooperatives. For example, shiitake, matsutake, morel and chanterelle mushrooms, as well as truffles, may be sold directly to gourmet French and Asian restaurants, Asian and natural food stores, or to a middleman or cooperative for resale to larger more distant markets. Markets for decorative products like salal and beargrass are in urban areas and overseas. Decoratives may be sold through cooperatives or to local buyers. Non-local buyers may also be reached through the Internet.

Benefits

Economic

Some products, especially medicinals and botanicals, can have tremendous economic value, while others provide a lower but steady supplemental income. For example:

- Forest-cultivated ginseng averages \$200-\$400 per pound, depending upon how closely the product resembles wild ginseng.
- A cord of wood worth \$50-\$100 can produce \$500 worth of shiitake mushrooms. In 1990, wholesalers paid from \$3.50 to \$10 per pound for shiitake mushrooms in the Southeast. Retail prices were between \$9 and \$12 per pound.
- Markets for floral decoratives have been steady or increasing. In 1991, buyers paid \$1.00 and \$1.00-\$1.60 for salal and beargrass, respectively, and about \$0.01 per swordfern frond.

• In 1996, honey was worth approximately \$3.00 per pound.

Conservation and System-Level

Forest farming activities modify the forest ecosystem but do not significantly interfere with its crucial contributions of water capture and filtering, soil erosion control, microclimate moderation and wildlife habitat. Producers should avoid harmful species and follow EPA approved guidelines for herbicides, fungicides and insecticides.

Social

Forest farming provides opportunities to generate short-term income from existing woodlots, with minimum capital investment. Especially on small family farms, this can contribute significantly to rural economic development and diversification.

Additional Information

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Organic Farming

Organic farming systems do not use toxic chemical pesticides or fertilizers to produce food and fiber. As an alternative, organic growers rely on prevention through the development of biological diversity and replenishment of soil fertility. In an effort to boost organic production, the United States government has focused on developing national certification standards to assure consumers of consistent quality in organic produce. Certification includes the inspection of farm fields and processing facilities.

Advantages:

- The input costs in organic farming are lower than in traditional farming.
- Organic farming is healthier for farm workers.
- Organic production supplies a well defined and growing market
- Organic farming practices are more environmentally friendly than traditional farming practices by preventing soil erosion, protecting water quality, and saving energy.

Disadvantages:

- Organic farming requires intensive labor and management input.
- There are risks involved with changing to a new production method.
- Organic certification organizations are not required to use nationalized standards for certification.
- Converting to organic production can involve extensive planning for the producer with a limited knowledge of organic farming systems.
- In many areas there are inadequate markets for organic products.

Sources:

General Sources are given due to the amount of information available at each site

- Journal of Extension, University of Florida <u>http://www.joe.org</u>
- University of Minnesota Extension
 <u>http://www.extension.umn.ede</u>
- Alternative Farming Systems Information Center http://www.nal.usda.gov/
- Organic Farming (many helpful links) http://www.doitnow.com/~smd/agorg.htm
- Florida Organic Growers and Consumers, Inc. (FOG) http://www.foginfo.org/event.html

Contact the FOG staff: Florida Certified Organic Growers and Consumers, Inc. P.O. Box 12311 Gainesville, FL 32604 Phone:(352) 377-6345

Transfer of Development Rights

Transfer of development rights is the separation of development rights from one property and their transfer to another property. The development rights are the unused development potential of a property. The rights can be used by the original owner on another piece of property or sold to another owner For a transfer of development rights program to be implemented a local legislature must identify a "sending district" where land conservation is desired and a "receiving district" where development is appropriate. Zoning in the sending district must often be adjusted to accept the transferred development rights. Properties that would be appropriate sending districts are natural, scenic, recreational, agricultural, forest, and open lands, or sites of historical, cultural or aesthetic value.

Advantages:

- Transfer of development (TDR) rights is way of compensating landowners in areas that are not appropriate for development. It allows landowners to make a profit on their land while continuing to farm or ranch.
- TDR can be used to protect sensitive areas whose environment, open space, or historic amenities are threatened by development.
- Not all development rights must be transferred from the sending district. Some development rights can be retained with development practices such as clustering and reducing densities.

Disadvantages:

- TDR programs are complex. They require a sophisticated analysis of the impacts that the transfer would have in the sending and receiving districts
- TDR programs are sensitive to market fluctuations such as housing demand, inflation and lending policies.
- Residents of the receiving area may object to transfers that result in higher zoning densities.

Sources:

- Pace Law School
 <u>http://www.law.pace.edu/landuse/btdr.html</u>
- Ohio State University, Community Development <u>http://www.ag.ohio-state.edu/~ohioline/cd-fact/1264.html</u>

Pace University Land use Law Center http://www.law.pace.edu/landuse/btdr.html

Transfer of Development Rights

SERIES III: Innovative Tools and Techniques, Issue Number 8

DEFINITION

New York statutes define transfer of development rights (TDR) as "the process by which development rights are transferred from one lot, parcel, or area of land in a sending district to another lot, parcel, or area of land in one or more receiving districts." Local governments are allowed great flexibility in designing a TDR program; they can establish conditions that they deem "necessary and appropriate" to achieve the purposes of the TDR program.

To implement a transfer of development rights program, the local legislature identifies a "sending district" where land conservation is sought and a "receiving district" where development of property is desired and can be serviced properly.

In many TDR programs, the zoning provisions applicable to the sending district are amended to reduce the density at which land can be developed. While losing their right to develop their properties at the formerly permitted densities, property owners in the sending district are awarded development rights. These development rights are regarded as severable from the land ownership and transferable by their owners.

TDR programs usually establish some method of valuing the development rights that are to be transferred from the sending to the receiving district. Some communities establish development rights "banks" which purchase development rights from landowners in sending districts and sell them to landowners in receiving districts.

Property owners in the receiving district are eligible to apply for zoning incentives that increase the densities at which their lands may be developed. To qualify for these incentives, the property owners must purchase the development rights from landowners in the sending district or from the development rights bank.

PURPOSE

According to New York statute, the purpose of a TDR program is "to protect the natural, scenic or agricultural qualities of open lands, to enhance sites and areas of special character or special historical, cultural, aesthetic or economic interest or value and to enable and encourage flexibility of design and careful management of land in recognition of land as a basic and valuable natural resource."

An effective TDR program allows a community, whose zoning ordinance creates a hard to service, spread out development pattern, to develop in a more cost-effective manner. An effective TDR program can increase the tax base while minimizing the costs of servicing land development; it can preserve threatened conservation areas while allowing owners of land in that area to be compensated through the sale of some or all of their former development rights.

WHEN

TDR programs are most often created in response to a perceived crisis in the area that becomes the sending district. That area, for example, may contain a precious resource such as an endangered species, a valuable economic resource such as viable agricultural soils, or a drinking water supply whose existence is threatened by development.

The TDR technique was also designed to combat inefficient land development patterns that can result from the build out of conventional zoning ordinances. Once the community realizes that its zoning ordinance is creating a high cost, environmentally questionable pattern of land use, it can create a TDR program to adjust zoning densities. Instead of rezoning to lower densities in the sending areas and increasing densities in the receiving areas, (creating a loss of investment expectations in the former and a windfall in the latter) the community can elect to provide for the transfer of development rights as its method of changing its zoning strategy.

AUTHORITY

The authority to create a TDR program is implied from the delegation of authority to local governments to adopt zoning ordinances and create zoning districts. Because this authority had been used sparingly, the state legislature, in 1989, amended the town, village and city law to clarify local TDR authority and to provide a specific procedure for creating and implementing a TDR program.

Although the statutes set out a specific process for establishing a TDR program, they also allow local governments to continue previously created programs and, apparently, to create programs in a different manner than that contained in the statutes. It is not completely clear, however, whether local legislatures must use their supersession authority under the municipal home rule law if they wish to adopt a TDR program that does not fully comply with the specific provisions of the statute. Any doubt on this subject can be removed by referencing the TDR provisions of the relevant 1989 statute, expressing the intent of the local legislature to supersede them, mentioning the provisions superseded, and otherwise complying with the requirements for superseding state law.

IMPLEMENTATION

In creating a TDR program, all procedures required for adopting and amending local zoning ordinances or laws, including all provisions for notice and public hearing, must be

followed. The local TDR program must be established in accordance with the comprehensive plan.

What constitutes an appropriate sending district is defined by the authorizing statute: it must consist of natural, scenic, recreational, agricultural, forest, or open land or sites of special historical, cultural, aesthetic or economic values sought to be protected. The statute allows municipalities to establish development rights banks to purchase development credits from landowners in sending districts and to sell them to landowners in receiving districts.

Communities that elect to create their TDR programs under the authorizing statutes must designate sending and receiving districts in a particular fashion, make a variety of detailed findings and take other specific action.

* Before receiving and sending districts are designated, a Generic Environmental Impact Statement must be prepared for the receiving distinct. Subsequently, individual projects developed in the receiving district need to comply with the environmental review procedures of state law only to the extent that their impacts were not reviewed in the Generic Environmental Impact Statement.

* Receiving districts must be found that contain adequate resources and infrastructure to accommodate the increased development. The board must determine that no significant environmental damage will result from this increase and the additional development is compatible with that permitted in the underlying zoning ordinance. This finding must be made after evaluating the effects of the potential increased development effected by the transfer of development rights to the receiving district.

* The locality must evaluate the effect of the TDR program on the potential development of low or moderate-income housing that might be lost in the sending district or gained in the receiving district. If loses and gains are not roughly equivalent, the locality must take action to compensate for any net loss of such housing.

* If the sending and receiving districts are in different taxing districts, the locality must find that the TDR program will not unreasonably transfer the tax burden between the taxpayers of such districts.

* A local TDR program must provide for the execution and filing of conservation easements on land in the sending district whose development rights have been purchased under the program. The easement must specify that it is enforceable by the local government.

* The program must, in addition, provide for the reassessment of the property tax value, within one year, of any parcel whose development rights have been transferred.

LIMITATIONS AND CONCERNS

TDR programs are complex. They require municipalities to engage in a sophisticated analysis of the impacts of the program in both sending and receiving districts. Programs typically raise significant issues that concern residents and owners in both sending and receiving districts. How much development potential is to be lost in the sending districts? How are these development "rights" to be measured and valued? How can a viable market for these rights be created? How many properties in the receiving district must be eligible for more intense development to create a viable market for the development rights created by the program in the sending district? Should a development rights bank be created? How is the administration of the bank and the execution and filing of the required conservation easement documents to be handled? What process should be put in place to review and approve development projects in the receiving district?

A particularly difficult aspect of designing a TDR program is determining how to define and value the development rights that are severed from the land and eligible to be transferred. According to the statute, a formula can be used to quantify the development rights to be transferred based on such factors as the lot area, floor area, floor area ratios, density, height limitations or any other criteria that effectively quantifies an appropriate value. The formula chosen converts development rights into specific development credits. When a development credit is purchased, it carries the right to a certain additional density in the receiving district.

How development rights are valued and a market for them created will determine the viability of the TDR program and, perhaps, its legal validity. In recent programs, the agencies created from two to two and one-half times the demand for development credits in the receiving district as the number of development credits in the sending district. For this market to work, there must be development pressure in the receiving area resulting in a desire by landowners to purchase development credits from the sending area. Whether such ratios can be established and whether sufficient development pressures exist are factors that must be considered by local leaders who create TDR programs.

ALTERNATIVE APPROACHES

In the description of a TDR program above, it is assumed that the zoning ordinance applicable to the sending district is to be amended to reduce the density at which the land may be developed. This could be called a *mandatory TDR program*. This definition is based on the way in which TDR programs have most often been structured, not on any limitation in the statutory description of the TDR authority.

However, the statute says nothing about reducing the permissible densities of development in sending zones. Presumably, a TDR program could be set up that leaves the existing zoning in place in the sending district and simply allows the development permitted by that zoning to be severed and transferred to the receiving district. Under such a program, the density incentives in the receiving district could be awarded to property developers in exchange for cash deposits into a dedicated fund which could be used to purchase conservation easements from willing landowners in the sending district. The development rights of the landowners in the receiving district are otherwise unaffected by the program. This could be called a *voluntary TDR program*.

Further, there is no requirement that any zoning change in the sending district take all development rights away from properties in that district. Where the sending area can be protected by reducing densities and, for example, clustering the remaining development on unconstrained portions of the land, some development rights can remain attached to the land rather than severed and made transferable. The owners of land in the sending district could be allowed to develop at a fraction of the previously allowed density and awarded fewer development credits as a result. This could be called *a partial TDR program*.

Whether to adopt a mandatory, voluntary, complete or partial TDR program depends greatly on the character of the land in the sending district and its vulnerability to development. Some commentators even suggest that the base densities in the receiving zone be lowered by zoning amendments when the TDR program is created to insure a larger market for the transferable development rights.

Making these choices is one of the more complicated aspects of designing a local TDR program. Most programs have opted for simplicity by proscribing most development in the sending district and providing for the severance and transferability of that development to properties in the receiving district where the existing zoning is otherwise left in place.

CITATIONS:

1. The statutes that authorize local governments to adopt TDR Programs are found at Town Law § 261-a, Village Law § 7-701, and General City Law § 20-f.

2. The authority of local governments to supersede general state law can be found at <u>Municipal Home Rule Law § 10(1)(ii)(d)(3)</u>. Provisions that must be followed to properly supersede a general state law are found at <u>Municipal Home Rule Law §22(1)</u>.

3. In French Investing Co. v. City of New York, 39 N.Y.2d 587, 385 N.Y.S.2d 5 (1976), the Court of Appeals struck down a rezoning which prevented all development of the land; the rezoning allowed the owner to transfer the development rights to another property, subject to a variety of conditions. In this particular urban situation, the court found that the market for the development rights was too contingent and uncertain to justify the compete removal of development rights to create a public amenity such as a park.

REFERENCES:

1. Transfer of Development Rights, Joseph Stinson, Land Use Law Center, 1996.

2. Transfer of Development Rights, Maanvi Mitra, Land Use Law Center, 1996.

3. Richard J. Roddewig and Cheryl A. Inghram, *Transferable Development Rights Programs: TDRs and the Real Estate Market Place*, American Planning Association Planning Advisory Service Report No. 401, May 1987. APA, 122 South Michigan Ave. Chicago, Il., 60603.

4. Transfer of Development Rights, N.Y. Department of State Legal Memorandum, Office of Local Gov't Services, 162 Washington Ave., Albany, N.Y. 12231; (518) 473-3355.

PROTECTING SENSITIVE LAND WITH TRANSFER OF DEVELOPMENT RIGHTS

A TDR program was established in the Pinelands area in southern New Jersey under the auspices of a regional pinelands commission created by the state in cooperation with local governments. Under that program, development rights are being transferred from ecologically fragile and agriculturally valuable lands to central receiving districts. These rights are converted to development credits, which are created on a per acre basis. The program awards development credits to landowners in the sending districts by increments of 39 acres. One credit is awarded for every 39 acres of woodlands, two for every 39 acres of productive agricultural land and .2 credits for every 39 acres of wetlands.

Under this New Jersey program, a developer who buys one credit is entitled to build an additional four houses in a residential receiving district. In other words, if a developer owns one acre in a receiving district, which is currently zoned for one dwelling unit, he can develop five units on that acre by purchasing one development credit. If a developer wishes to build only one additional home, he would buy 1/4 of a credit. A development rights bank has been created to purchase credits from landowners in sending districts and sell them to landowners in receiving districts.

A significant TDR program was recently created in eastern Long Island in the Central Pine Barrens, an environmentally fragile and resource rich area encompassing over 100,000 acres. Faced by requests for over 220 development projects in the area and stymied by time consuming and costly litigation over their environmental impacts, the towns, landowners, developers, citizens and environmentalists joined together to develop a plan, including the use of TDR, to preserve a core area of about 55,000 acres.

The Long Island Pine Barrens TDR Program was modeled after the New Jersey Pine Barrens program. The Long Island Program was established under state legislation adopted in 1993 and is implemented under a comprehensive land use plan adopted in April 1995. Several municipalities with jurisdiction over the Pine Barrens area are involved in the program. The comprehensive plan allocates Pine Barrens Credits to land in designated sending districts based on their development yield. Land in the sending district is not allowed to be developed under the zoning ordinance. Instead, that zoning is used to determine the development rights that may be transferred. The development yield varies according to the number of units the zoning ordinance permits per acre. If zoning permits four units per acre, the development yield factor established is 2.7, yielding that number of credits.

The comprehensive plan establishes overlay districts into which development rights can be transferred. If a developer purchases one credit, he will be able to build one unit above density in a receiving district. Overall, the receiving areas are structured to provide a demand for credits in the receiving sites that exceeds the number of credits created in the sending sites by a ratio of 2.5 to 1. This ratio was calculated to create sufficient competition to ensure an active market for the development credits in the sending districts. The state legislation creating this program established a TDR bank, funded by an allocation of \$5 million to provide an initial market for the credits. The bank is authorized to purchase credits from owners in sending districts and sell them to owners in receiving districts.

Ohio State University Fact Sheet <u>http://www.ag.ohio-state.edu/~ohioline/cd-fact/1264.html</u>

Transfer of Development Rights

CDFS-1264-98 Land Use Series

Timothy J. Lawrence

Current concern over the rapid and increasing loss of farmland has led to explorations of ways to protect our valuable land resources. One of several options being considered is called the transfer of development rights (TDR). Transfer of development rights refers to a method for protecting land by transferring the "rights to develop" from one area and giving them to another. What is actually occurring is a consensus to place conservation easements on property in agricultural areas while allowing for an increase in development densities or "bonuses" in other areas that are being developed. The costs of purchasing the easements are recovered from the developers who receive the building bonus.

The transfer of development rights is not a new concept. TDRs have been used in other areas of the country for the preservation or protection of open space, natural resources, farmland, and urban areas of historical importance. TDRs also have been used to secure land for solid waste facilities and for the protection of golf courses. More than 20 states have enacted or amended statutes accommodating the TDR concept. Currently, seven states have TDR statutes specific to farmland protection. A brief explanation of the general principles of TDRs and their current use is essential to understanding how they could be used to protect Ohio farmland, natural resources, and open space.

The Rights of Ownership

Property ownership can be described as a bundle of individual rights. The ownership of land includes rights pertaining to minerals, timber, agriculture, riparian rights, surface and ground water, air, and development, to name the most common. Use of these rights is not absolute. Governmental entities do have the right to constrain, to a certain extent, a property owner's use of these rights and thus the economic value that the property owner can derive from the property. The most commonly used restraint has been on the exercise of the individual's use of development rights primarily through zoning.

Development Rights Are Independent of Land Ownership

The concept of TDRs provides for financial compensation to property owners while society imposes land-use regulations to control growth and development. This approach involves severing the right to develop an area that the public wishes to preserve in low density or open space and transferring those rights to another site where higher than normal density would be tolerated and desirable. The development right is independent of land ownership. The development right becomes a separate article of private property and can be shifted from one area to another and can have economic value.

Facilitating Land-Use Planning

TDRs are regulatory tools designed to facilitate land-use planning. Unlike most community comprehensive plans, the transfer of development rights requires much more certainty of where development will happen and where it will not. TDR programs do more than preserve farmland, natural resources, and open space; they change the way development occurs in a community. However, TDR programs cannot be established in the absence of a comprehensive plan. Implementation of a TDR in the absence of true comprehensive planning represents a failure to recognize that development credit values depend on a stable and predictable real estate environment.

Buying Development Rights

TDRs are very similar to the more commonly known purchase of development rights (PDR) programs (see OSU Extension Fact Sheet CDFS 1263-98, Purchase of Development Rights. The value of the PDR or development easement is the difference between the agricultural or open space value and the development value. For example, if the value of the land for agriculture is \$2,000 per acre and the development right would be \$4,000. However, market forces will determine the ultimate value of the development right. PDR programs require that a governmental agency or land trust purchase the development rights to a particular property. The development rights on the piece of property are then "retired" through deed restriction.

The difference between a TDR and a PDR is that the TDR is done in more of a controlled setting where areas are predetermined as "sending" or "receiving" areas. Private developers or local governments purchase the development rights from within the sending areas and transfer them to an area to be developed; this area is known as the "receiving" area. The owner of the preserved site retains existing use rights while receiving compensation for the development value of the land. As a result, the development potential of the property is, in effect, frozen. By lessening the economic impact of protectively zoned property and enabling the owner to recoup the economic value of the property's frozen potential, the TDR is designed to minimize the objections to such zoning.

Buying and Selling Rights, Not Land

Thus, TDR makes it possible for there to be a free exchange (buying and selling) of development rights without having to buy or sell land. The down zoning (changing of the allowed density to a higher number of acres per unit, i.e., going from one unit or home per five acres to one unit or home per 40 acres) a government entity may impose on a sending area does not necessarily reduce the economic value of the property within that area, because the development rights remain in the landowners' hands and can be used on other properties of the owner or sold to others for use elsewhere.

Two Types of TDR Programs

The most common TDR program allows the landowner to sell the development rights to a developer who then uses those development rights to increase the density of houses on another piece of property at another location (i.e., going from 1/4 acre per unit to 1/6 acre per unit). A variation of that type of a TDR would be a situation in which the developer transfers the development rights from one property to another property the developer owns. The higher density that developers are able to realize is the incentive for them to buy development rights. A second method allows a local government to establish a TDR Bank to transfer development rights. In this method, developers, who wish to develop at a higher density than current zoning allows, would purchase development rights from the local government. Again, the higher density is the incentive for the development rights to purchase the development rights. The local government could then use these funds to purchase development rights of properties in areas that it wants to protect from urban development. The receiving area could not increase in density higher than some maximum set within the comprehensive land-use plan. The difference between the density with or without the TDR credits would be the permitted "bonus" that the developer could realize.



Figure 1. Transfer of Development Rights (Platt, 1996)

Figure 1. Transfer of Development Rights (Platt, 1996)

Components of a TDR Program

There are four main elements of a TDR that must exist in all successful programs:

- 1. A designated preservation zone (the sending area, described earlier).
- 2. A designated growth area (the receiving area, described earlier).
- 3. A pool of development rights that are legally severable from the land.

4. A procedure by which development rights are transferred from one property to another.

Without these components, landowners will have trouble finding a buyer for their development rights. The lack of a market for landowners who are mandated to sell their development rights to realize the economic development value of their property could be grounds for legal action. Under a voluntary TDR program, the lack of a receiving area would result in development occurring in the sending area just as before and with little land being protected.

Incentives. It is essential that developers have an incentive to purchase development rights (i.e., a density bonus). As part of the comprehensive plan, a TDR program must provide incentive for the government to increase the building capacity within the receiving zones when TDRs are used. This extra capacity is approved only after the developer transfers the development rights he or she may own, or purchases those rights from landowners in the sending areas, or from the TDR Bank. It is recommended that receiving areas should provide for about 30 to 50 percent more building units that the actual number of transferable rights would allow. This creates a competitive market among landowners wishing to sell development rights, and among developers needing to purchase those rights. It is important to note that receiving areas do not have to be contiguous to the sending area nor do they have to be in one large mass. However, wherever the receiving/sending areas are, the use of TDRs should be consistent with a community's comprehensive plan, future land-use map, zoning, and capital improvement program.

Features of an Effective TDR Program

TDR programs are very complex and can be very difficult to administer. They can be an effective tool in the preservation of farmland and natural resources; however, they are appropriate only in very limited areas and circumstances. Several features are important in determining the effectiveness of a TDR program.

• Ease of understanding

To be effective, a TDR program should be simple and easy for landowners and the public to understand. There must be a strong commitment to the TDR program by the political leadership of the community. A TDR program takes time to work and must be mandatory, rather than voluntary, for landowners in the sending area and for the higher density building in the receiving areas. Smart developers usually can gain extra density through variances or other means and will have little incentive to purchase development rights unless the zoning process is relatively inflexible and incorruptible. Political pressure to change back to the old ways, before the program has had a chance to work, may be very strong.

Managed Growth

The TDR program should be part of a growth-management program. The county, municipality, or regional planning area must have a solid comprehensive plan and tight zoning ordinances in order to support a TDR program. The ultimate purpose of a TDR program is to create more efficient growth patterns. However, it is just as important for there to be long-term growth expectations to assure landowners in the sending area that there is value in their development rights. TDRs will not work in very rural areas where there is little or no development pressure on the area to be preserved. Within the receiving areas, the county, municipality, or regional plan must include policies, zoning ordinances, and capital improvement programs that will assure

communities in the designated growth areas that a public facility overload will not result from the TDR density bonus.

• Adequate Incentives

Farmers need adequate incentives to sell their development rights just as developers need adequate incentives to purchase the development rights. Also, the density bonus in the receiving areas must be attractive enough for developers to want to purchase the development rights. The value of the development rights should be predictable and should adequately reflect the true value of the development rights in order to encourage farmers to participate. The establishment of a TDR Bank can help keep a program active during slow economic times and provide a floor for TDR prices. In addition, developers may find it easier to purchase development rights from a governmental entity, rather than from individual landowners.

• Careful Management

Finally, a well-trained planning staff must carefully manage the program. Staff members must be well skilled not only in the fundamentals of planning but also in public relations to explain the program to politicians, landowners, developers, and the public.

Ups and Downs of TDRs

Unfortunately, what works well in theory may not be effective in practice. While TDRs appear to be an effective method of preserving farmland, open space, and natural resources, the reality of the situation is that they have been primarily effective within urban settings. There are a few successful TDR programs in rural areas. Most notably Montgomery County, Maryland, and the Pinelands in New Jersey stand out as programs that have preserved thousands of acres. However, even within these success stories, the use of TDRs is not without problems or controversy. There must be clear sending and receiving areas. Where considerable sprawl exists within the sending area, it may be too late for a TDR program to be successful. Residents within the receiving areas may object to the higher density necessary for a TDR program. Tom Daniels, in his recent book on the subject, Holding Our Ground: Protecting American Farms and Farmland, notes that "Next to establishing effective agricultural zoning on the urban fringe and the political struggles that involves, TDR is the most difficult farmland preservation technique to establish."

The distribution of development rights is the distribution of wealth, and distribution formulas raise equity issues at least as severe as those involved in rezoning. TDR programs may not provide the type of protection that a community might expect and may not provide the equitable distribution of the wealth that the landowners might expect. It has been argued that the only equitable basis for the distribution of development rights is in proportion to the losses landowners suffer due to change in land-use controls. Based on the current farmland TDR programs operating around the country, it is questionable if TDRs can satisfy those losses except in very limited and specific circumstances.

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Platt, Rutherford H. Land Use and Society: Geography, Law, and Public Policy. Island Press: Washington, D.C. 1996.

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Value-Added Agriculture

Value added agriculture is the processing of raw materials and by products to add further value to a product. Value–added can be applied to both food and non-food enterprises. This approach can allow the producer to capture more of the profit that would normally go to the middleman. A further component of value-added is addressing niche markets and marketing to them. There are a variety of ways to add value to products such as packaging, drying, canning, juicing, handcrafts and agritourism.

Advantages:

- Value-added processing gives producers a greater portion of each food dollar
- Making use of seconds or culls
- Extends the season

Disadvantages:

- Costs of developing value added must be evaluated
- Increases demands on the producer
- Increases overhead

Sources:

- University of Arizona, Direct Farm Marketing and Tourism Handbook
 http://ag.arizona.edu/AREC/pubs/dmkt/Opportunities.pdf
- Iowa State University Extension, Value-Added Agriculture <u>http://www.exnet.iastate.edu/Pages/valag/</u>
- Michigan State university Extension, Value-Added Agriculture http://www.msue.msu.edu/valueadded/faq's1.htm

Michigan State University http://www.msue.msu.edu/valueadded/faq's1.htm

Value-Added Added Agriculture

FREQUENTLY ASKED QUESTIONS ABOUT VALUE ADDED

What is value added?

Value added refers to increasing the customer value offered by a product or service. It is a production/marketing strategy driven by customer needs and perceptions. It adds features to a raw agricultural, marine, aqua cultural, or forestry material used to make a product. Examples of value added agriculture is food processing, drying, canning, juicing, handcrafting, unique packaging, labeling and marketing. The farmer is not only involved in production of a raw commodity but also takes part in processing, and distribution of the product. This is known as vertical integration. Value added marketing is a relatively new concept to many traditional producers, and involves significant capital, teamwork, and integration of diverse segments of the food industry. Doing more of the processing and marketing activities takes time skill and extra labor.

Why Value added?

Declining grain prices, federal farm policies, changing consumer choices and intense competition for agricultural commodities have created a sudden need to explore alternative production/marketing strategies. The recent establishment of producer owned, value added processing cooperatives in the Red River Valley region have provided farmers with opportunities to increase sales and profits.

A flurry of activities from value added cooperatives based in Great Plains region have given a clear signal that farmers are moving up the food chain. In the past, there was a clear 'disconnect' between agriculture producers and their ultimate customers, the consuming public. The middlemen harnessed most of the profits in the food chain. As a result farmers would only receive about 1-2% return on their investment. If the farmers can move up the food chain by engaging in manufacturing and direct marketing, rather than just selling their raw commodities to a local dealership, then they would realize higher returns on their investment. Clearly there are higher profits to be made between the time a raw product is produced on the farm and it is ultimately transformed into a food product served on a plate.

Today's food consumers want taste, nutrition, freshness, variety, and convenience. Ethnic populations are growing and niche markets are becoming available. By engaging in value added agriculture farmers are expecting to increase their net farm profits that would otherwise go to the middlemen in the food chain. The value added concept transforms growers from 'price takers' to 'price makers'.

Value added coop's control processing steps and achieve greater product reliability, quality control, and volume. Members receive a greater return for their products. Co-op's reduce risks

associated with new business enterprises, keep jobs in the rural communities, and strengthen the local tax base.

Do the benefits of value added agriculture reach only the food consuming public?

No. Value added means different things to different customers. To a food customer, value added may indicate a high protein or pesticide free product. To a farmer, value added may mean using varieties that are resistant to roundup or resistant to European corn borer (Bt corn), so that he or she have to rely less on pesticides resulting in less production cost.

What are the challenges facing farmers in value added agriculture?

It requires sound marketing savvy. Getting a new product into the highly competitive retail market is very difficult. USDA estimates that at least two out of every three new food products introduced into the market fail due to lack of customer appeal. Only one in five new businesses succeeds for more than five years. Failure to do market research and the lack of a sound business plan are leading causes for failure.

List the important considerations for a new food entrepreneur?

Market Research Business Structure Business plan Liability Regulations Technology Food Safety Packaging Materials Labeling Rules Trade Names, Patents, and Copyrights

How many years does it take for farmers to realize value added benefits?

It takes time for consumers to adjust to a new product. Farmers should afford to invest on a new product for about 3-4 years before realizing profits.

What is a key feature of a successful value added venture?

Almost all value added ventures have a project champion who is a leader and a visionary, and who is able to bring together consensus and teamwork. He should be able to persuade others to join and take reasonable risks

General Small Farm Sources

1. Southern Region Sustainable Agriculture Research and Education Program http://www.griffin.peachnet.edu/sare/

Welcome to Southern Region Sustainable Agriculture Research and Education Program



 $SARE\,$ is a competitive grants program funded by USDA

and EPA to promote research and education about sustainable agriculture. Calls for proposals are issued each year to start the competitive process. Established in 1988, SARE has funded close to 1,200 projects that examine how to improve agricultural profitability, protect natural resources and foster more viable rural communities. Information from the projects is disseminated through various publications.

The Southern Region includes: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, Puerto Rico and the US Virgin Islands.

The other three regions also have web sites:

- <u>Western</u> Alaska, American Samoa, Arizona, California, Colorado, Guam, Hawaii, Idaho, Micronesia, Montana, Nevada, New Mexico, N. Mariana Islands, Oregon, Utah, Washington, Wyoming
- <u>North Central</u> Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin
- <u>Northeast</u> Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, West Virginia

2. USDA home page <u>www.usda.gov</u>

USDA UNITED STATES DEPARTMENT OF AGRICULTURE

Welcome Newsroom

What's New Agencies, Services & Programs USDA Offices

Subject Search/Help



E-mail the Secretary

History & Mission

History of American

- <u>Agriculture</u>
- •The People's Department
- <u>Agriculture Factbook</u>
- Former Secretaries
- Mission Statement

Structure & Organization

· Current Administration and

- Biographies
- Budget Summary 2000
- Agencies
- Headquarters Organization
 Chart
- Strategic Plan
- · <u>Strategic (lan</u>

Federal Authorities

- United States Code (USC)
- Code of Federal Regulations
- <u>(CFR)</u>

Current Legislation from USDA

to the United States Department of Agriculture

In 1862, when President Abraham Lincoln founded the U.S. Department of Agriculture, he called it the "people's Department." In Lincoln's day, 90 percent of the people were farmers who were in need of good seed and information to grow their crops. Today, USDA continues Lincoln's legacy by serving all Americans, the two percent who farm as well as everyone who eats, wears clothes, lives in a house, or visits a rural area or a national forest.

USDA remains committed to assisting America's farmers and ranchers. But we also do much more--

- USDA leads the Federal anti-hunger effort with the Food Stamp, School Lunch, School Breakfast, and the WIC Programs.
- USDA is the steward of our nation's 192 million acres of national forests and rangelands.
- USDA is the country's largest conservation agency, encouraging voluntary efforts to protect soil, water, and wildlife on the 70 percent of America's lands that are in private hands.
- USDA brings housing, modern telecommunications, and safe drinking water to rural America.
- USDA is responsible for the safety of meat, poultry, and egg products.
- USDA is a research leader in everything from human nutrition to new crop technologies that allow us to grow more food and fiber using less water and pesticides.
- USDA helps ensure open markets for U.S. agricultural products and provides food aid to needy people overseas.

To learn more about USDA:

Farm and Foreign Agricultural Services assists farmers and ranchers and represents American agriculture around the world.

Food, Nutrition, & Consumer Service runs the Federal food assistance programs and coordinates nutrition research and policy.

<u>Food Safety</u> administers the Federal meat and poultry inspection system and educates industry and consumers about food safety.

<u>Marketing & Regulatory Programs</u> assists with the marketing of American agricultural products and monitors animal and plant health and safety.

<u>Natural Resources & Environment</u> maintains our national forests and grasslands and promotes conservation of private lands.

<u>**Rural Development</u>** is dedicated to improving the economy and quality of life in rural America.</u>

Research, Education, & Economics conducts agricultural and economic research to assess and develop solutions to agricultural problems.

<u>Departmental Administration</u> is USDA's administrative, management organization.

-Disclaimer-

Effort has been made to provide accurate and complete information. However, we cannot guarantee that there will be no errors. Neither the U.S. Government, USDA, nor Cornell University assumes any legal liability for the accuracy, completeness, or usefulness of any information, product, or process disclosed herein, or represents that use of such information, product, or process would not infringe on privately owned rights.

The USDA website contains links to various other Federal and state agencies and private organizations. These links are maintained solely for the user's information and convenience. Once you link to another site, please be aware that you are then subject to the policies of the new site. In addition, please note that USDA does not control and cannot guarantee the relevance, timeliness, or accuracy of these outside materials. Further, the inclusion of links or pointers to particular items in hypertext is not intended to reflect their importance, nor is it intended to constitute approval or endorsement of any views expressed, or products or services offered, on these outside web sites, or the organizations sponsoring the web sites.

U.S. Department of Agriculture 14th & Independence Ave., SW Washington, DC 20250 Telephone: 202-720-2791 USDA Fax number 202-720-2166

3. USDA Small Farm www.usda.gov/oce/smallfarm/sfhome.htm



4. USDA Rural Development http://www.rurdev.usda.gov



Creating New Opportunity for Rural America



<u>Go to USDA</u> <u>Site Index</u> <u>Questions/Comments</u> <u>Nonprofit Gateway</u> <u>Privacy Statement</u> <u>Non-discrimination Statement</u> <u>FirstGov.gov</u>

5. Rural Development Internet Sources http://www.rurdev.usda.gov/other_sites.html



Rural Development Internet Resources

Agriculture Census Information Thank you for visiting the Rural Development Internet site. We hope you found the information here helpful.

Government	
Health	
Housing	
Infrastructure	
Native American	
Additional Resources	

We have compiled a list* of some of the many online resources you might find useful. Using the menu to the left, select the area that interests you. When you have finished surfing, please visit the Rural Development Internet site again soon.

* Rural Development is not responsible for the accuracy of the content of non-Rural Development sites nor should links to these sites be construed as our endorsement of the views contained therein.

Agriculture

Agricultural Fact Book 1998 --- <u>http://www.usda.gov/news/pubs/fbook98/content.htm</u> Gives basic facts on U.S. agriculture, including its structure, the farm sector and rural America. Gives an overview of USDA and description of its programs.

Agrinet ---- <u>http://agrinet.tamu.edu/</u>

Developed by the Texas A& M University Agricultural Program, this site provides a single starting point to all agricultural resources on the Internet. It's objective is to promote agribusiness and enhance agricultural product marketing and research.

Census of Agriculture --- http://govinfo.kerr.orst.edu/ag-stateis.html

Provides a complete picture of the agricultural sector in the U.S. economy by county, state or zip code.

Center for Sustainable Agriculture Systems (CSAS) --- <u>http://ianrwww.unl.edu/ianr/csas/</u> An interdisciplinary center formed in 1991 for the purpose of bringing together people and resources to promote an agriculture that is efficient, competitive, profitable, environmentally and socially sustainable for the indefinite future.

Small Farm Program --- <u>http://www.reeusda.gov/smallfarm</u>

The Small Farm Program at the Cooperative State Research, Education, and Extension Service (CSREES) agency within USDA is committed to meeting the needs of the small farm communities. Its mission is to improve small farm income levels and the economic viability of the small farm enterprises through partnerships with the land grant system, public and private sectors by encouraging research, extension and education programs that meet the specific needs of small farmers. Also includes a link to current issues of their Small Farm Digest newsletter.

Additional Resources: Guides, Publications, Libraries, etc.

Agricultural Fact Book 1998 --- <u>http://www.usda.gov/news/pubs/fbook98/content.htm</u> Gives basic facts on U.S. agriculture, including its structure, the farm sector and rural America. Gives an overview of USDA and description of its programs.

Carroll Publishing --- http://www.carrollpub.com/

Federal, state and local government information. Also links to county and municipal areas.

Communications for a Sustainable Future ---- <u>http://csf.colorado.edu/</u>

Computer networking to enhance communications, with the objective of working through disparate views and ideologies to secure a more promising future.

ERS Electronic Publications ---- <u>http://www.econ.ag.gov/epubs/pdf/index.htm</u> Include periodicals, research reports, statistical bulletins, and other monographs.

Federal Bulletin Board ---<u>http://fedbbs.access.gpo.gov</u>

Provides access to information from the White House and Executive Branch agencies (includes independent agencies) to the public.

Funding Resources --- <u>http://www.nal.usda.gov/ric/ruralres/funding.htm</u> Links to financial resources on the Internet.

Government Information Exchange --- <u>http://www.info.gov/</u>

Links to Federal, state and local government information. Also foreign/international information. Maintained by GSA's Federal Telecommunications Service.

Government On-line --- <u>http://www.gol.org/</u>

Provides government executives with summary information about successful programs and the ability to learn more in specific areas of interest.

Grants Web --- http://web.fie.com/cws/sra/resource.htm

Links to government resources, general resources, private funding resources and policy information.

Map References --- http://www.cgrer.uiowa.edu/servers/servers_references.html

Links to maps in the U.S.--national, state, city and regional. Also world maps, foreign countries as well as geographic references and library and book information.

National Agricultural Library (NAL) --- http://www.nal.usda.gov

Part of the Agricultural Research Service of the U.S. Department of Agriculture. The library is a major source for agriculture and related issues.

Participatory Action Research Network --- http://www.PARnet.org/home.cfm

Maintained by Cornell University, PARnet is a centralized gateway to online resources: for access to method descriptions, for research support, and for general news and information.
Rural Information Center --- http://www.nal.usda.gov/ric

Provides information and referral services to local government officials, community organizations, health professional organizations, rural telephone and electric cooperatives, libraries, businesses and rural citizens working to maintain the vitality of America's rural areas.

Rural Information Resources --- <u>http://www.nal.usda.gov/ric/ruralres/resource.htm</u> This site has links to other rural resources on a variety of topics-including federal information, business, education, funding, health, job training, welfare and others.

The Civic Network ---- http://www.civic.net:2401/

An evolving collection of online resources dedicated to supporting civic life and citizen participation. The Civic Network is a project of the Center for Civic Networking.

U.S. State and Local Gateway --- http://www.statelocal.gov

A one-stop web site of Federal information for state and local governments. The Gateway was developed by Federal agencies and associations representing sate and local officials and employees in collaboration with Vice President Gore's National Performance Review.

White House Electronic Publications ---

<u>http://www.whitehouse.gov/WH/Publications/html/Publications.html</u> Public access to documents including transcripts of the President's speeches and press conferences, press briefings, policy statements, fact sheets and announcements of nominations.

6. USDA Rural Development in Florida http://www.rurdev.usda.gov/fl/index.html



Rural Development in Florida/Virgin Islands

Welcome to the USDA, Rural Development Homepage for Florida/Virgin Islands. We, the employees, of USDA, Rural Development are excited to provide you with information about our programs to assist rural citizens of Florida/Virgin Islands.

At this site you will find information on programs available through USDA, Rural Development along with a directory of offices and personnel. Additionally, please view the announcements as we plan to update this section regularly with news on program availability, funding and events. The overall mission of USDA Rural Development is to improve the quality of life for rural Americans. To accomplish this we have the responsibility of coordinating Federal assistance in rural areas of our great state.

Working closely with profit and non-profit sectors, along with state, tribal, and local governments, we are fundamentally changing the way in which the Federal government does business. With this new philosophy of public partnership many positive outcomes for rural Americans are occurring daily.

It is Rural Development's intention to ensure rural citizens can participate fully in the global economy. By providing technical assistance and programs to rural Americans a stronger economy will be built and will improve the quality of life for all.

Office Information and Organization

The Florida State Office, located in Gainesville, Florida, administers USDA Rural Development programs through seventeen field office sites across the state and the Virgin Islands. Each site is committed to serving those in search of information and assistance with Rural Development programs and initiatives. The following links will provide you with office locations and points of contact for information about our programs to assist in your endeavors.

Florida Rural Development Offices

State Director, Lucy A. Bartlett 4440 N.W. 25th Place Gainesville, Florida 32606 Telephone: 352-338-3400 Fax: 352-338-3405 Email: lucy.bartlett@fl.usda.gov

> Director, Louis E. Frost, Rural Housing Service 4440 N.W. 25th Place Gainesville, Florida 32606 Telephone: 352-338-3435 Fax: 352-338-3437 Email: louis.frost@fl.usda.gov

Director, Glenn E. Walden, Rural Utilities Service 4440 N.W. 25th Place Gainesville, Florida 32606 Telephone: 352-338-3440 Fax: 352-338-3452 Email: glenn.walden@fl.usda.gov Director, Joseph M. Mueller, Rural Business Services 4440 N.W. 25th Place Gainesville, Florida 32606 Telephone: 352-338-3482 Fax: 352-338-3450 Email: joe.mueller@fl.usda.gov

Director, Ronald J. Berry, Administrative Programs 4440 N.W. 25th Place Gainesville, Florida 32606 Telephone: 352-338-3412 Fax: 352-338-3404 Email: ron.berry@fl.usda.gov

CRESTVIEW AREA OFFICE

J. Danny Garland Rural Development Manager 932 N. Ferdon Blvd., Suite B Crestview, Florida 32536 Phone: (850) 682-2416 Email: joseph.garland@fl.usda.gov Counties Served: Bay, Escambia, Holmes, Okaloosa, Santa Rosa, Walton and Washington

MARIANNA AREA OFFICE

Eugene Pittman Acting Rural Development Manager 2741 Pennsylvania Avenue, Suite 5 Marianna, Florida 32448 Phone: (850) 526-2610 Email: eugene.pittman@fl.usda.gov Counties Served: Calhoun, Columbia, Franklin, Gadsden, Gulf, Hamilton, Jackson, Jefferson, Lafayette, Leon, Liberty, Madison, Suwannee, Taylor and Wakulla

OCALA AREA OFFICE

Charles Nichols

Rural Development Manager

2303 N.E. Jacksonville Road, Suite 400

Ocala, Florida 34470

Phone: (352) 732-7534

Email: charles.nichols@fl.usda.gov

Counties Served: Alachua, Baker, Bradford, Citrus, Clay, Dixie, Duval, Flagler, Gilchrist, Levy, Marion, Nassau, Putnam, Seminole, St. Johns, Union and Volusia

BALDWIN

Denise Dailey Community Development Manager 260 U.S. 301 North Baldwin, Florida 32234 Phone: (904) 266-0088 E-Mail: denise.dailey@fl.usda.gov Counties Served: Baker, Bradford, Clay, Duval, Nassau, St. Johns and Union

BARTOW

Peggy Johns Community Development Manager 1700 Hwy. 17 S., Suite 3 Bartow, Florida 33830-6633 Phone: (863) 533-2051 E-Mail: peggy.johns@fl.usda.gov Counties Served: Desoto, Hardee and Polk

CHIPLEY

Darren Gavin Community Development Manager 1424 Jackson Ave., Suite B Chipley, Florida 32428 Phone: (850) 638-1982 E-Mail: darren.gavin@fl.usda.gov Counties Served: Bay, Holmes and Washington

DEFUNIAK SPRINGS

Perry Jackson Community Development Manager 732 N. Ninth Street, Suite A DeFuniak Springs, Florida 32433 Phone: (850) 892-3712 E-Mail: perry.jackson@fl.usda.gov Counties Served: Okaloosa and Walton

LIVE OAK

Roy S. Dicks Community Development Manager 10094 US 129 South Live Oak, Florida 32060 Phone: (904) 362-2681 E-Mail: roy.dicks@fl.usda.gov Counties Served: Columbia, Hamilton, Jefferson, Lafayette, Madison, Suwannee and Taylor

MARIANNA

Leonard Gossen Community Development Manager 2741 Pennsylvania Avenue, Suite 7 Marianna, Florida 32448-4014 Phone: (850) 526-2610 E-Mail: leonard.gossen@fl.usda.gov Counties Served: Calhoun, Gulf, Jackson and Liberty

MILTON

Peggy A. Willey Community Development Manager USDA, AGRI Center 6275 Dogwood Drive Milton, Florida 32570 Phone: (850) 623-2441 E-Mail: peggy.willey@fl.usda.gov Counties Served: Escambia and Santa Rosa

OCALA

Lisa Krug Community Development Manager 2303 N.E. Jacksonville Road, Ste. 300 Ocala, Florida 34470 Phone: (352) 732-7534 E-Mail: lisa.krug@fl.usda.gov Counties Served: Alachua, Citrus, Dixie, Gilchrist, Levy and Marion

PLANT CITY

Angela Smith Community Development Manager 1001 E. Baker St., Suite 400 Plant City, Florida 33566 Phone: (813) 752-1474 E-Mail: angela.smith@fl.usda.gov Counties Served: Hillsborough, Manatee, Pinellas and Pasco

QUINCY

Joseph Balkcom Community Development Manager 2138 W. Jefferson St. Quincy, Florida 32351 Phone: (850) 627-6365 E-Mail: joseph.balkcom@fl.usda.gov Counties Served: Franklin, Gadsden, Leon and Wakulla

7.Farm Service Agency http://www.fsa.usda.gov



Florida State & County Office Information

State Office Structure				
Office	Name	Phone		
State Executive Director	Kevin L. Kelley	352-379-4500		
State Committee Chairperson	R. Mark Wilson	305-248-7070		
State Committee Chairperson	M. Copeland Griswold	904-994-8465		
State Committee Member	Verneil Johnson	904-776-1301		
State Committee Member	Arthur Sandlin	352-528-6762		
State Committee Member	G. Fredrick Saunders Jr.	407-656-2291		

8. Natural Resources Conservation Service http://seweb.ga.nrcs.usda.gov/fl/index.html



solutions to natural resource problems. Our goal is to help people conserve, improve and sustain Florida's natural resources and environment. We work closely with our conservation partners at the local, State and Federal level to assure that Floridians and visitors have an adequate supply of clean water, fresh air, productive soil and a quality life.

The United States Department of Agriculture (USDA) prohibits discrimination in its programs on the basis of race, color, national origin, sex, religion, age, disability, political beliefs, and marital or familial status. (Not all prohibited bases apply to all programs.)

Persons with disabilities who require alternate means for communication of program information (Braille, large print, audiotape, etc.) should contact USDA's Target Center at (202) 720-2600 (voice and TDD).

To file a complaint, write the Secretary of Agriculture, U.S. Department of Agriculture, Washington, D.C., 20250, or call (202) 720-7327 (voice) or (202) 720-1127 (TDD).

USDA is an Equal Opportunity Employer

USDA, Natural Resources Conservation Service 2614 NW 43rd Street Gainesville, FL 32606 (352) 338-9500

> webmastr@fl.nrcs.usda.gov December 2000

9. Alternative Farming Systems Information Center http://www.nal.usda.gov/afsic/index.html



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Welcome to <u>AFSIC</u>, one of several Information Centers at the U.S. Department of Agriculture's (USDA) National Agricultural Library (NAL).



<u>Sustainable</u> Agriculture



Community Supported Agriculture (CSA) Information



Alternative Farming Systems Information Center

<u>USDA, ARS, NAL</u> 10301 Baltimore Ave., Room 304, Beltsville, MD 20705-2351 Phone: 301-504-6559; FAX: 301-504-6409 <u>afsic@nal.usda.gov</u>



<u>SAN</u> is the National Communications and Outreach arm of the USDA Sustainable Agricultural Research and Education Program (SARE).

About the Alternative Farming Systems Information Center

The Alternative Farming Systems Information Center (AFSIC) is one of several topic-oriented information centers at the National Agricultural Library (NAL). The Library, located in Beltsville, Maryland, is the foremost agricultural library in the world, and is one of four U.S. national libraries along with the Library of Congress, the National Library of Medicine, and the National Library of Education. AFSIC is supported, in part, by USDA's Sustainable Agriculture Research and Education (SARE) program.

AFSIC specializes in locating and accessing information related to alternative cropping systems including sustainable, organic, low-input, biodynamic, and regenerative agriculture. AFSIC also focuses on alternative crops, new uses for traditional crops, and crops grown for industrial production.

AFSIC staff create and publish *Quick Bibliographies* (QBs), *Special Reference Briefs* (SRBs) and *Agri-Topics* (ATs). These publications focus on specific topics of current interest. QBs are bibliographic in nature, and are reflective of materials contained in the National Agricultural Library collection and/or indexed in NAL's database, AGRICOLA. SRBs and ATs provide a broader picture of a topic, including descriptive text and organizational resources, as well as suggested reading lists.

Most AFSIC publications are available in ASCII text through this website under Publications. To obtain AFSIC publications on computer diskette, or in hardcopy (limited availability), please make requests by contacting the AFSIC office by phone, mail, or e-mail. A complete list/printable order form of all AFSIC publications and format availability is available under AFSIC Publications: Hardcopy/Diskette Order Form.

Books, articles, and videocassettes cited in AFSIC bibliographic publications are not available directly from AFSIC. For information on how to obtain these materials, please read NAL Document Delivery Information.

Specific topics not covered by AFSIC QBs, SRBs and ATs may be addressed, on request, by AFSIC reference staff through brief, complementary database searches.

Electronic Resources

AFSIC's Home Page (<u>http://www.nal.usda.gov/afsic</u>) includes these electronic resources:

- <u>About AFSIC:</u> Describes the Alternative Farming Systems Information Center and our services.
- <u>Publications:</u>
 - o "Great Places to Find Information about Farming Alternatives"
 - o "Educational Training Opportunities in Sustainable Agriculture Directory"
 - Sustainable Agriculture in Print Series
 - "AFSIC Information Products: Current List/Order Form"
 - o Links to our alternative agriculture-related publications and bibliographies
- <u>Current Topics</u>: This section will include brief literature searches on alternative farmingrelated topics of current interest.
- <u>Aquaculture</u>: Resources include contacts, publications, directories, and links to aquaculture-related web sites.
- Patents Related to Alternative Farming Methods
- <u>Alternative Agriculture-Related Internet Sites and Documents</u>
- <u>Search</u> the AFSIC Web Site.
- <u>Disclaimers</u> related to the AFSIC Web Site use.

For further information concerning the services and activities of the Center, contact:

Alternative Farming Systems Information Center National Agricultural Library, Rm 304 10301 Baltimore Ave. Beltsville MD 20705-2351 Telephone: 301/504-6559 or 301/504-5724 FAX: 301/504-6409 TDD/TTY: 301/504-6856 E-mail: <u>afsic@nal.usda.gov</u> (use lower case letters only)

10. ATTRA: Appropriate Technology Transfer for Rural Areas http://www.attra.org/

ATTRA Appropriate Technology Transfer for Rural Areas

ATTRA - Appropriate Technology Transfer for Rural Areas - is the national sustainable farming information center operated by the private nonprofit <u>National Center for Appropriate Technology</u> (NCAT).

ATTRA provides technical assistance to farmers, Extension agents, market gardeners, agricultural researchers, and other ag professionals in all 50 states. Topics addressed by ATTRA can be categorized into three broad areas:

- sustainable farming production practices
- alternative crop and livestock enterprises
- innovative marketing

Technical assistance, publications, and resources are provided free of charge to appropriate users. ATTRA is funded through a cooperative agreement with the USDA Rural Business--Cooperative Service agency.

The National Center for Appropriate Technology is a 501(c)3 non-profit organization with programs in sustainable agriculture, rural development, renewable energy, and low-income housing. The ATTRA program is one of several sustainable agriculture projects managed by NCAT.

Appropriate Technology Transfer for Rural Areas P.O. Box 3657 Fayetteville, AR 72702 1-800-346-9140 M-F 8:30am-4:30pm CST F 8:30am-12:30pm CST

About ATTRA

ATTRA - Appropriate Technology Transfer for Rural Areas - is a leading information source for farmers and Extension agents thinking about sustainable farming practices.

Each year, ATTRA specialists prepare thousands of resource packets on alternative agriculture topics like:

- Sustainable Farming
- Organic Farming
- Permaculture
- Holistic Resource Management
- Diversified Crop and Livestock Enterprises
- Natural Pest Controls
- Biological Pest Controls
- Non-Chemical Weed Control
- Cover Crops, Green Manures, Crop Rotations

- Composts, Organic Fertilizers, Novel Soil Amendments
- Organic Vegetable Production
- Low-Spray Fruit Production
- Sustainable Livestock and Poultry Enterprises
- Complementary Animal Health
- Sustainable Pasture Management
- Rotational Grazing
- Innovative Marketing

11. University of Florida Institute of Food and Agricultural Sciences http://gnv.ifas.ufl.edu/



Institute of Food and Agricultural Sciences



IFAS is

- Putting FLORIDA First
- Units & Departments 🕨
- Faculty & Staff Directory
 - Jobs Available 🕨
 - For Students 🕨
 - Alumni 🕨
 - Top News 🕨
 - Publications
- Search the IFAS Web site 🕨

The Institute of Food and Agricultural Sciences

- mission is to develop knowledge in:
- agricultural resources
- human resources
- natural resources
- life sciences

and make that knowledge accessible to sustain and enhance the quality of human life.

12. Florida State Rural Development Council http://members.tripod.com/FSRDC/

The Florida State Rural Development Council is a pro-active, private/public alliance that fosters the ongoing ability of rural communities to further their goals and addresses issues that affect rural Florida communities.

The Florida State Rural Development Council (FSRDC) was initiated in 1993. The Council is one of 36 councils nationwide which are designed to bring a clearer focus to rural development policy and programs and to promote collaborative intergovernmental partnerships with the private sector. The FSRDC organizational structure includes a 26-member executive committee comprised of representatives from the government, public, private, business and tribal sectors. With over 1000 individual and organizational members located in communities throughout the state, the FSRDC is Floridas largest and strongest public/private rural development partnership.

Florida State Rural Development Council 30 Research Road Quincy, Florida 32351

850/875-7113 - fax 850/875-7148 Toll-Free (in Florida only) 1-888-FL-RURAL

13. Agriculture, Food and Community Partnership Cornell's Agricultural Development and Diversification Program <u>http://www.cals.cornell.edu/agfoodcommunity/afs_ld.cfm</u>

The Agriculture, Food and Community Partnership integrates and coordinates Cornell University's College of Agriculture and Life Sciences' teaching, research and extension activities in the areas of small farms, community food systems, community agriculture development, and agroforestry. At this site you can learn about these activities and easily access information about projects and organizations within New York State, regionally, and nationally that are working to promote communities with sustainable food and agriculture systems. This site offers numerous links to publications by Cornell University and various topics related to small farms

Farming Alternatives Program 216 Warren Hall Ithaca, NY 14853 (607) 255-9832

14. Georgia Organics http://www.georgiaorganics.org/

The Georgia Organics is a 501(c)(3) nonprofit organization established in 1997 to promote sustainable and organic agriculture in Georgia. Members range from farmers to urban homeowners throughout Georgia and neighboring states.

The Needs We Address

- Agriculture and gardening have become increasingly dependent on synthetic inputs and cultivation practices that are degrading soils, water resources, and wildlife habitat.
- Family farms need more profitable and environmentally beneficial ways to keep their land and improve their livelihoods. Keeping family farms in business means rural communities are stronger; less land is gobbled up by subdivisions and strip malls.
- The shift toward factory-like farming increasingly controlled by fewer and fewer companies is negatively impacting small farms and rural communities. These shifts are also denigrating the biodiversity of plants and livestock, and the integrity of organically produced food and fiber.
- Consumers want and should have access to safe, nutritious and flavorful farm-fresh products.

Our Goals

Georgia Organics promotes a food and agriculture system that is sustainable by:

- Educating farmers regarding sustainable agricultural practices that provide consumers with safe and nutritious food products, improve farm family incomes, and protect natural resources.
- Educating gardeners on ecologically sound gardening practices.
- Educating consumers on the effect their food choices have on the environment and on family farms.
- Collaborating with institutions of policy, research, extension or education to address the need for sustainable and organic agriculture in Georgia.
- Providing organic certification services.

Sustainable agriculture and gardening involves agricultural practices that are profitable, environmentally sound, and beneficial to rural communities and society in general. Organic agriculture is an ecological production management system that promotes and enhances biodiversity, biological cycles, and soil biological activity. It is based on minimal use of off-farm inputs and on management practices that restore, maintain and enhance ecological harmony.

Our Activities

Members started an ambitious array of programs and activities that include:

- Annual conference on sustainable agriculture
- Web site and list-serv
- Organic certification

- Workshops and Seminars
- Training for state and federal agencies serving agriculture
- Farm and garden tours for the public
- Georgia Organics Newsletter
- Farm internships
- On-farm research

Members are important to Georgia Organics

The strength of Georgia Organics is in its members. Many of our programs and activities are started by members to help meet our organizational objectives. Members serve on GO's diverse board of directors.

To become a member of GO, submit this membership form.

Help us stay in touch with you by joining the list-serv.

For more information, contact the GO Hotline at 770-621-4642 or send an email to us at: georgiaorganics@pd.org.

15. Small Farm Resource http://www.farminfo.org

The Small Farm Resource has been created to help disseminate information of use to people with small farms or rural property. It is a cooperative effort. The site has numerous links to other sites and publications of interest to small farmers.

16. Small Farm Magazine <u>http://www.smallfarm.com/</u>

American SMALL FARM is the largest national magazine, which specializes exclusively in the interest and needs of the American Small Farmer. We define small farm or ranch to include between 5 and 300 acres that is owner operated. Our goal is to provide readers with information that will help them make their farm more efficient, more profitable and the work easier. We write about the business and science of agriculture. Our stories attempt to share the values and opportunities inherent to small farms. We invite readers to share ideas.

To receive American SMALL FARM Magazine send check or money order to: American SMALL FARM Magazine Attn: Circulation 267 Broad St. Westerville, OH 43081 Phone: 614.895.3755 Fax:614.895.3757

17. Small Farm Center at University of California Davis http://www.sfc.ucdavis.edu/

University of California Small Farm Center



- The Small Farm Program
- Small Farm Program Farm Advisors
- Food Safety
- Small Farm-Related Research
- On-line Expert Databases
- NEW <u>Publications</u>
- Postharvest Fact Sheets
- <u>Contact Information</u>
- Please give us feedback...

- California Agri-Tourism Database
- <u>Agricultural Tourism Home Page</u>
- Small Farm-Related News
- Specialty Crops
- <u>Calendar</u>
- Links (including UC news on terrorist attacks)
- <u>Agricultural Statistics</u>
- Materiales en Español

Useful Acronyms and Abbreviations

AFPA	Agricultural Fair Practices Act
AMS	Agricultural Marketing Service
APHIS	Animal and Plant Health Inspection Service
ARS	Agricultural Research Service
ATTRA	Appropriate Technology Transfer for Rural
	Areas
B&I	Business and Industry
CRAT	Civil Rights Action Team
CRIT	Civil Rights Implementation Team
CREEES	Cooperative State Research, Education, and
	Extension Service
ECIP	Environmental Quality Incentive Program
ERS	Economic Research Service
FAC	Food and Agricultural Council
FAIR	Federal Agricultural Improvement and Reform
	Act
FAS	Foreign Agricultural Service
FCS	Farm Credit System
FFAS	Farm and Foreign Agricultural Service
FICA	Federal Insurance Compensation Act
FMHA	Farmers Home Administration
FMNP	Farmers Market Nutrition Program
FNCS	Food, Nutrition. And Consumer Services
FNS	Food and Nutrition Service
FS	Forest Service
FSA	Farm Service Agency
FSMIP	Federal State Marketing Improvement Program
GATT	General Agreement on Tariffs and Trade
GIPSA	Grain Inspection, Packers and Stockyards
	Administration
IRP	Intermediary Relending Program
IRS	Internal Revenue Service
MRP	Marketing and Regulatory Programs
NAFTA	North American Free Trade Agreement
NASS	National Agricultural Statistics Service
NCI	National Caner Institute
NIEHS	National Institute of Environmental Health
NRCS	Natural Resources Conservation Service
NRE	Natural Resources and Environment
OBPA	Office of Budget and Program Analysis
OCE	Office of the Chief Economist
OGC	Office of the General Council
OCR	Office of Civil Rights

00	Office of Outreach
OSHA	Occupational Safety and Health Administration
PACA	Perishable Agricultural Commodities Act
PCSD	President's Commission on Sustainable
	Development
RBEG	Rural Business Enterprise Grant
RBCS	Rural Business Cooperative Service
RC&D	Resource Conservation and Development
RD	Rural Development
REE	Research, Education and Economics
RHS	Rural Housing Service
RMA	Risk Management Agency
SARE	Sustainable Agriculture Research and Education
SDSF	Sustainable Development and Small Farms
SFP	Small Farm Program, CSREES
USDA	United States Department of Agriculture
WIC	Women, Infants, and Children