
Attachment I: The Carrot Project
Compilation of Pre- and Post-Survey Data for
NESARE 11-310 Measuring Profitability & Success, December 2015.

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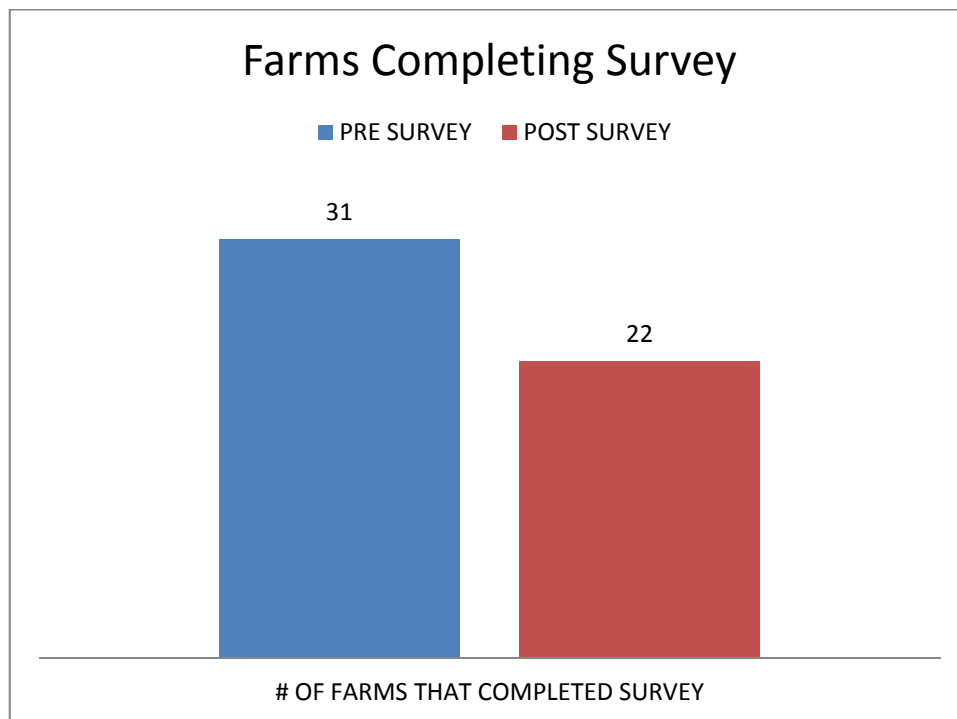
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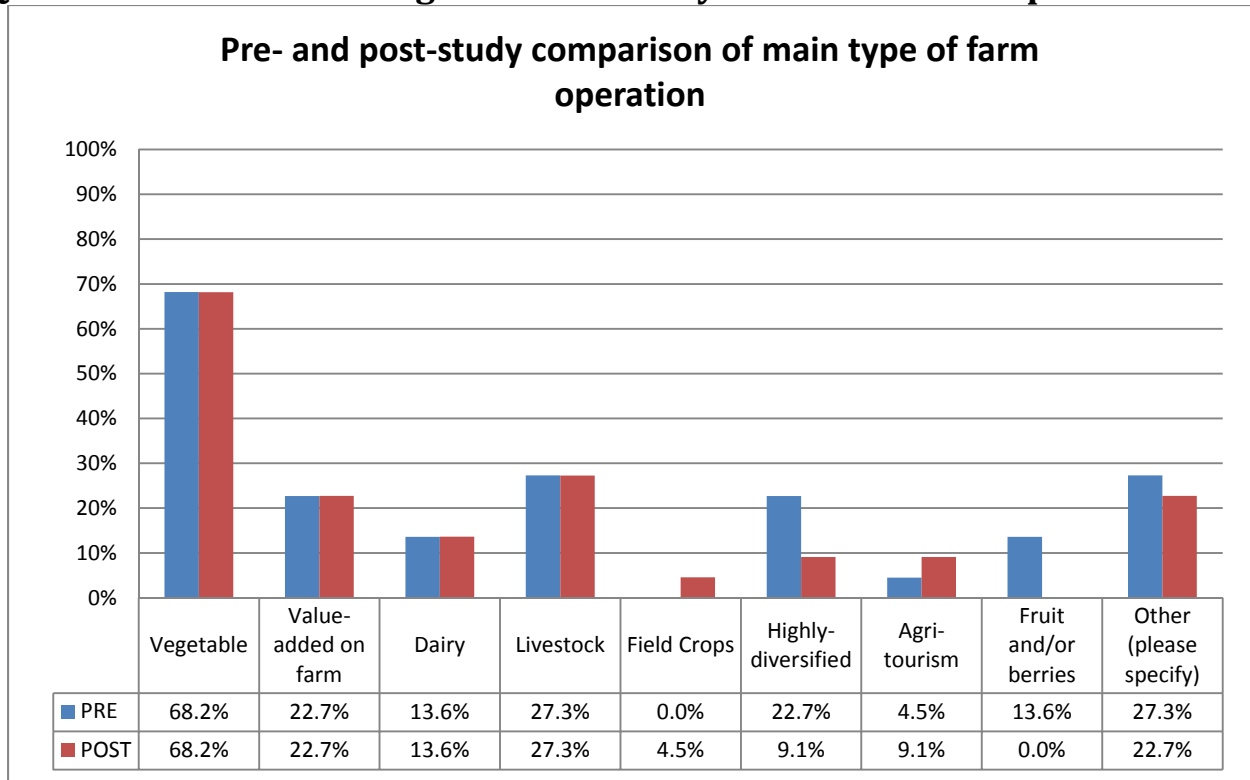
Methodology

Pre survey participant cohort was sorted to exclude all farms that did not complete both surveys. Of 31 who completed pre survey 22 completed both pre and post survey. Chart data compares these same farm businesses before and after participation in SARE11-310 Measuring Profitability and success.



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Q2: Which of the following best describes your farm’s MAIN operation?



N=22	Vegetable	Value-added on farm	Dairy	Livestock	Field Crops	Highly-diversified	Agri-tourism	Fruit and/or berries	Other
PRE	15	5	3	6	0	5	1	3	6
POST	15	5	3	6	1	2	2	0	5

“Other” responses from Pre Survey:

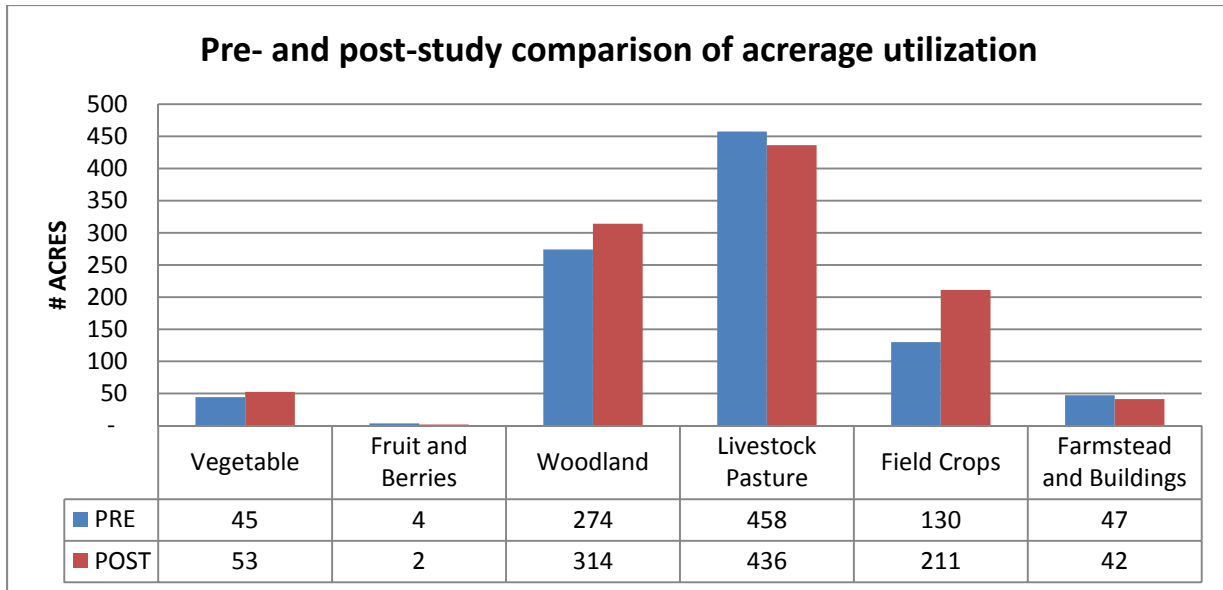
1. Medicinal herbs and berries, Meat production
2. flowers, chicken, herbs
3. honey bees
4. Hay
5. 2-person family dairy. Split time between: milking 1X/day; run a creamery for value-added products-cheese, yogurt, and bottled raw milk, which they sell at farmers’ markets.
6. Beef cattle

“Other” responses from Post Survey:

1. Focus on growing medicinal crops, specifically for value-added products.
2. flowers, chicken, herb
3. Livestock, Beef and Hay. Heifers
4. Genetics
5. Beef cattle

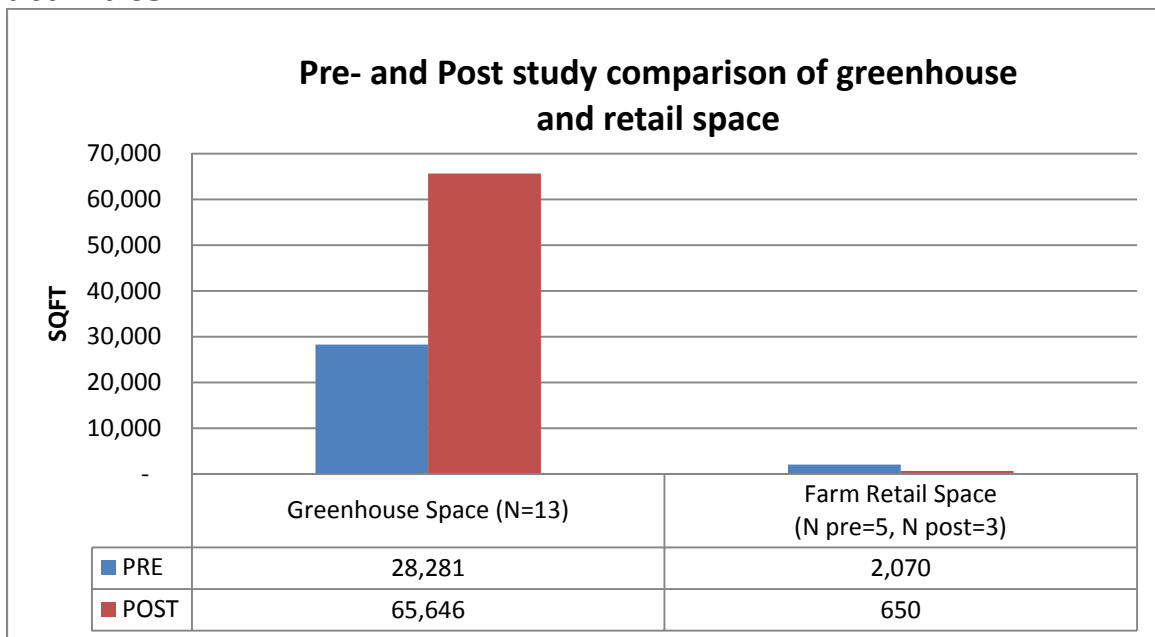
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Q3: How many acres of your farm are utilized for the following activities?



Total Acres	Average Acreage	Average Farm Size	Vegetable	Fruit & Berry	Wood land	Livestock Pasture	Field Crops	Farmstead
1569	PRE (N=22)	71	3	0.2	27	25	33	4
1508	POST (N=22)	69	3.1	0.2	24	31	23	4

Q3: How many acres of your farm are utilized for the following activities?

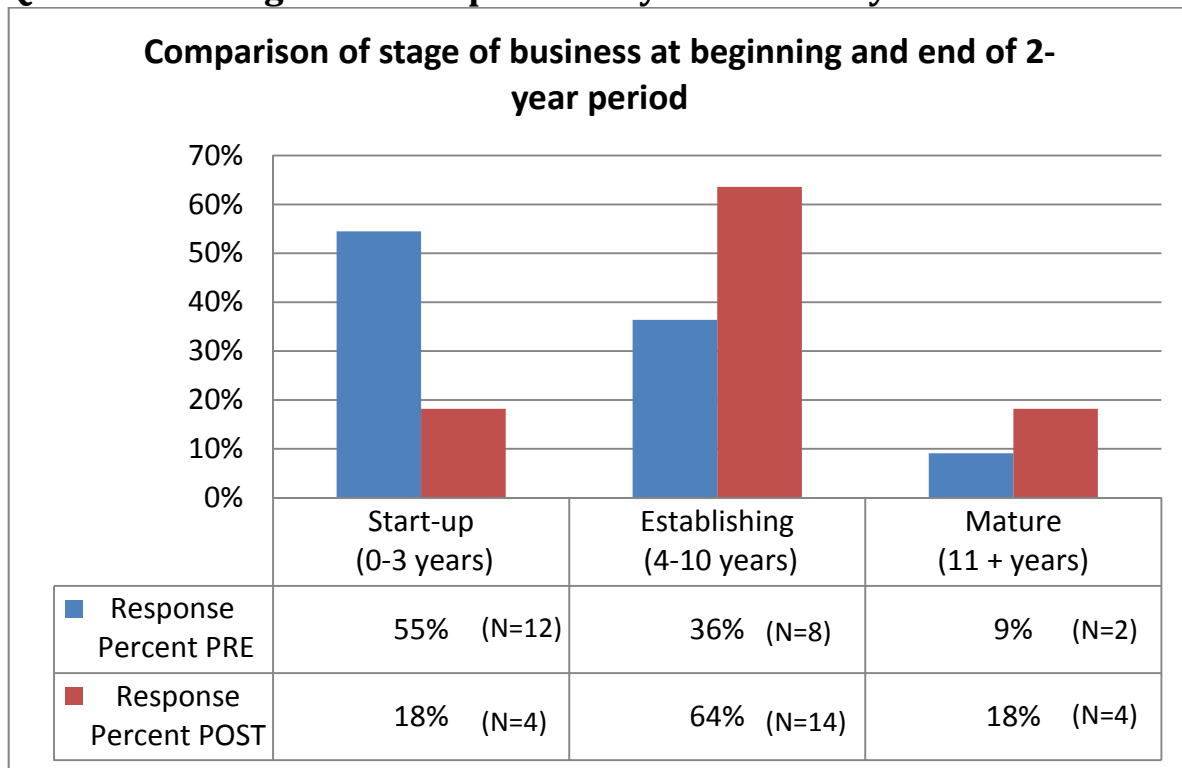


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Q4: For livestock and poultry producers, please indicate your animal numbers.

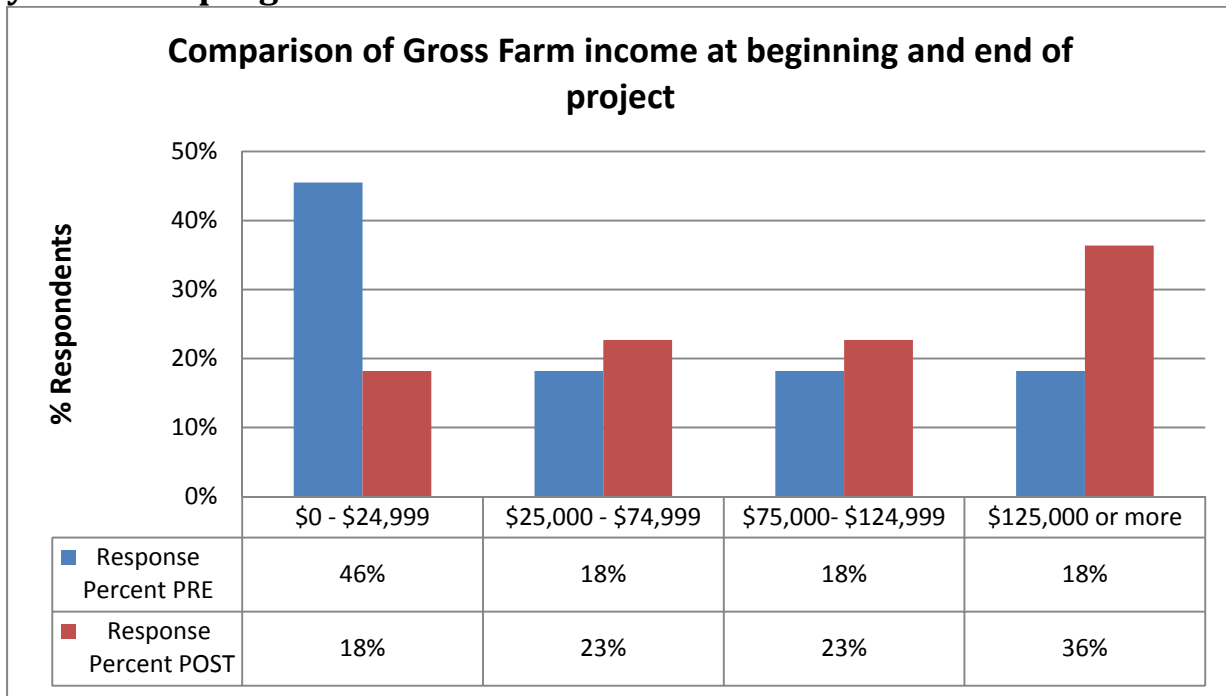
Pre- and post-study comparison of number of animals						
Average # Animals	Laying Hens	Broilers	Finished Hogs	Finished Beef	Milking Cows	Finished Lambs
PRE (12)	65	255	10	38	85	7
POST (12)	88	425	7	52	85	25
% CHANGE	35%	67%	-31%	36%	-1%	257%

Q5: At what stage of development do you consider your farm business?



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Q6: PRE, What was your Gross FARM Income the year prior to starting the program? POST, What was your Gross FARM Income your final year in the program?

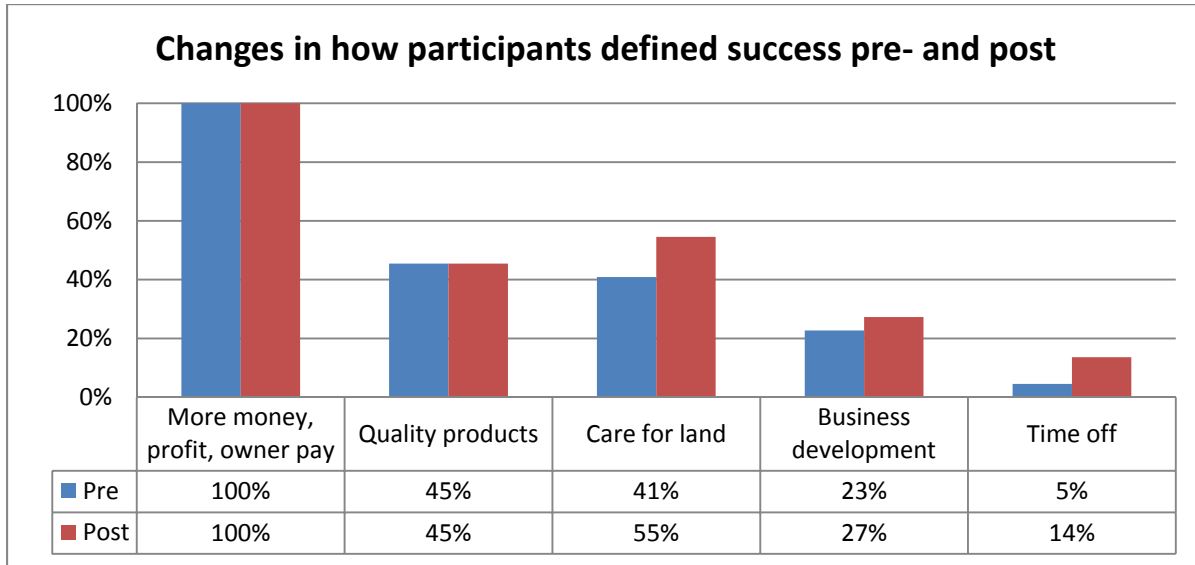


Answer Options	\$0 - \$24,999	\$25,000-\$74,999	\$75,000-\$124,999	\$125,000 or more
Response Count PRE	10	4	4	4
Response Count POST	4	5	5	8
% Change	-60%	25%	25%	100%

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Q7 PRE Survey: How do you define success for your business?

Q7 is a text based answer. See Table below for full responses. The chart below was created by sorting text answers into categories. All farms included a reference to increased money in their answers most farmers had more than one category in their definition of success. For instance, some farmers defined success as both increased profit and increased vacation time.



**Changes in how participants defined success pre- and post
18 of 22 respondents (82%) noted no change in defining success.**

Q7 PRE-How do you define success for your business?		
Total responses	22	100%
More money, profit, owner pay	22	100%
Quality products	10	45%
Care for land	9	41%
Business development	5	23%
Time off	1	5%
Q7 POST-Reflecting on how you defined business success upon entering the program? Would you change anything now?		
Total responses	22	100%
More money, profit, owner pay	22	100%
Quality products	10	45%
Care for land	12	55%
Business development	6	27%
Time off	3	14%

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**POST SURVEY Q7: Reflecting on how you defined business success
upon entering the program? Would you change anything now?**

	Q7--Response Text PRE How do you define success for your business?	Q7--Response Text POST Reflecting on how you defined business success upon entering the program? Would you change anything now?
1	The farm can pay for its' own expenses, provide us with fresh food we need and have a little money on the side.	hoping to refinance to help with expenses to understand #s in order to direct our energy understand our finances better
2	grow good veggie, maintain infrastructure & equipment, pay the mortgage, pay myself	Yes. Success now has much more to do with personal sustainability in addition to ecological and financial sustainability. Feeling that the farm is managed well and doing well will allow me to feel better (or, at least, less guilty) about taking some time during the summer to spend time with family.
3	Profitable by year two. Sustained earnings to be able to eventually afford to buy property. Satisfied customers and growing a quality product I'm proud of. Enough income to provide a livable wage.	I would add the ability to have leisure time during the season as a measure of success.
4	When I am able to pay pay myself \$25,000 a year. When I have an efficient and well organized business that is making a profit.	NO CHANGE
5	Have to enjoy the work. Pay all the bills. Being able to manage the herd so production is more even year round--would improve successfulness.	When we first entered the program, our goals were short term and focused on achieving cash flow throughout the year to pay the bills. We are now at a point where we are able to look forward to longer term goals and projects. We have downsized our farm and changed our business by processing all of our milk, instead of selling fluid milk. We have become more business focused and fine tuned our operation
6	Profitable financially, environmentally sustainable and socially conscious, ie good nutrient dense food at affordable prices	No change in defining success. The farm must be financially/environmentally/socially profitable.
7	1. We, the owners, can make our full living off the farm 2. Owners' salaries provide a good quality of life 3. Owning and participating in the business contributes to a high quality of life for the owners	1. We, the owners, can make our full living off the farm 2. Owners' salaries provide a good quality of life 3. Owning and participating in the business contributes to a high quality of life for the owners

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	<p align="center">Q7--Response Text PRE</p> <p>How do you define success for your business?</p>	<p align="center">Q7--Response Text POST</p> <p>Reflecting on how you defined business success upon entering the program? Would you change anything now?</p>
<p align="center">8</p>	<p>Adequate Family time; healthy relationships at home and with apprentices; giving apprentices a good learning environment & experience; making our families income including saving and retirement; maintaining current infrastructure and equipment and capitalizing future growth</p>	<p>We would still like to be saving for retirement.</p>
<p align="center">9</p>	<p>i feel my business will be successful when i am able to provide myself with the income necessary to sustain a comfortable lifestyle, while providing full time employment for a farm manager and seasonal employment for a small group of farm workers. Also I will consider my business successful when I have a system down that requires the least amount of inputs (labor, fertilizer, etc) for a maximum output while protecting the ecology of my land.</p>	<p>NO CHANGE</p>
<p align="center">10</p>	<p>Ability to maintain what we have, grow a little bit each year, remain solvent, buy new equipment every year or 2 as needed, take a vacation every once and a while, and pay all the bills at the end of the month!</p>	<p>Ability to maintain what we have, grow a little bit each year, remain solvent, buy new equipment every year or 2 as needed, take a vacation every once and a while, and pay all the bills at the end of the month. No change since I came into the program!</p>

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	<p align="center">Q7--Response Text PRE</p> <p>How do you define success for your business?</p>	<p align="center">Q7--Response Text POST</p> <p>Reflecting on how you defined business success upon entering the program? Would you change anything now?</p>
<p align="center">11</p>	<p>holistic goal we developed during MOFGA's Farm Beginning course this fall: Quality of Life</p> <ul style="list-style-type: none"> • To maintain financial security and pay down debt by earning at least half of our living (in terms of dollars, food and energy) from sustainable management of our land • To provide space and time to meet the physical and emotional needs of all members of our family during all seasons of the year, including healthy food, time for rest, contemplation and fun, privacy, and meaningful connections with family and friends • To contribute to and benefit from the resilience of our local community, including neighbors, market customers, employees, fellow farmers, and other local business owners • To reestablish a balanced ecosystem on our farm and reduce consumption of off-farm energy and material inputs <p>Forms of Production</p> <ul style="list-style-type: none"> • Will be profitable (i.e. the monetary or functional value of products generated will exceed the value of inputs and time spent in production) and will provide a living wage for all family members, employees and/or farming partners • Will be selected so the labor required for production and marketing is spread as evenly as possible across the year and so as much labor as possible can come from within our family or local community. • Will be marketed and/or donated as locally as possible and selected to complement the offerings of other local farms • Will generate increasingly nutritious and flavorful products and increasingly balanced, self-sustaining and productive soils in both field and woods <p>Future Description</p> <ul style="list-style-type: none"> • Land <ul style="list-style-type: none"> o Balanced soil and healthy plants in fields, pasture and woods o Self-sustaining via recycling of nutrients and captured solar energy • People <ul style="list-style-type: none"> o Healthy, happy, mindful and grounded o Strongly connected through mutual exchange of resources, nourishment, knowledge and kindness • Community <ul style="list-style-type: none"> o Respects, supports and protects all kinds of families and individuals o Relies primarily on locally-produced and sustainably harvested food and energy o Comes together often for fun, education, work and mutual aid 	<p>Our definition of success (netting half our living expenses from the farm business and growing more organic food for our region) has not changed - the marketing and production strategies to achieve success have changed somewhat.</p>

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	Q7--Response Text PRE How do you define success for your business?	Q7--Response Text POST Reflecting on how you defined business success upon entering the program? Would you change anything now?
12	financially solvent, growth to 5 acres, personal satisfaction, building relationships with the hilltown community, successful vegetable production (healthy/disease free), relationships with local schools	We have built community in our micro-region and that continues to be a crucial part of success. I would redefine financially solvent to mean the farm pays it's own expenses and covers cost of maintenance and repairs, eventually generating a portion of our income, but not 50%.
13	Developing a land-based business which minimizes the use of fossil fuels for its operation A business which will be able to pay a salary/income to make it sustainable Compliments the other working lands businesses in our community Teaches our family and others about farming and working lands businesses Good stewardship of land	Yes. Mark helped us focus on the things which we felt we could be profitable doing. Gave up trying to raise sheep after starting work with Marc. Mark also help us understand how large we would need to scale things in order to make them profitable.
14	At this point it will mean paying ourselves a modest salary while also paying back investors/debtors. Ultimately it will mean earning enough to expand our operations and diversify our operations (producing value-added, holding classes, etc.) so that we will be sustainable.	Haha, no. We are still striving to find a way to make our small farm support at least one person's income.
15	We want to be sustainable in all areas. We want to care for and hopefully improve the land we have custody of. We want to provide a living wage for ourselves and our employees. We want to develop stable markets of dedicated customers.	We're still moving toward the same goals. I would add stability of land tenure to our definition because with land tenure in question the business can't really be sustainable. We are working on finding a long term home for the business.
16	- connecting our ideals and our livelihood - growing delicious food in an environmentally and economically sustainable manner - supporting our household with income from the farm - Meeting demands for our product in our community and/or gradually increasing production in order to do so	no change. Still resonates.
17	During start up we have felt successful if we are continuing to make capital investments to improve our operation, while covering our living expenses, and not going into debt. Long term success will be a farm that is ecologically responsible, producing high quality produce for our customers, and sustaining our family financially.	The only change is the "not going into debt" part. We did take on a loan in the past year (to put up a heated propagation greenhouse). We felt confident doing this because of our increased confidence in our financial standing.

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	Q7--Response Text PRE How do you define success for your business?	Q7--Response Text POST Reflecting on how you defined business success upon entering the program? Would you change anything now?
18	When we are successful, we will have built up the health of our soils and pastures in order to grow abundant food for our community. We will have diversified our farm system by integrating livestock and perennial crops. Our farm will be supported by a dedicated customer base of local people who feel connected to the farm in a meaningful way. We will have created year-round employment for others who wish to learn and farm with us. Lastly, we will have established a financially sustainable farm business that provides our family with a stable income and rewarding work.	I still like my earlier answer.
19	To achieve profits of over \$500K	No
20	My business will be successful when I am financially stable, can manage the farm with environmental sustainability in mind, and have free time to either recreate, be a part of my community, or do something besides farming that supports my mental and emotional wellbeing.	I would keep everything I originally stated, and add that success would be having a business that allows me to draw a modest salary and have a high quality of life.
21	<ol style="list-style-type: none"> 1. Ability to provide family living needs. 2. Ability to contribute to dairy farm finances. 3. Repeat customers who become valued friends. 4. Guests who tell us they gain significant appreciation for farm life and increased understanding of agriculture. 5. Contribute to all of agriculture and agritourism for the benefit of other farm families, Vermont, and wider community. 	NO CHANGE
22	I would like to earn a living wage. I'm attempting to establish a small farm that has limited labor, and has a high-quality specialty market.	No, I feel I have achieved my goal of creating a consistent specialized high-quality product. Due to the farm's size it does not require my full attention year-round allowing me flexibility to travel and find other sources of income. Considering the amount of time I spend farming I feel it provides me with a livable wage.

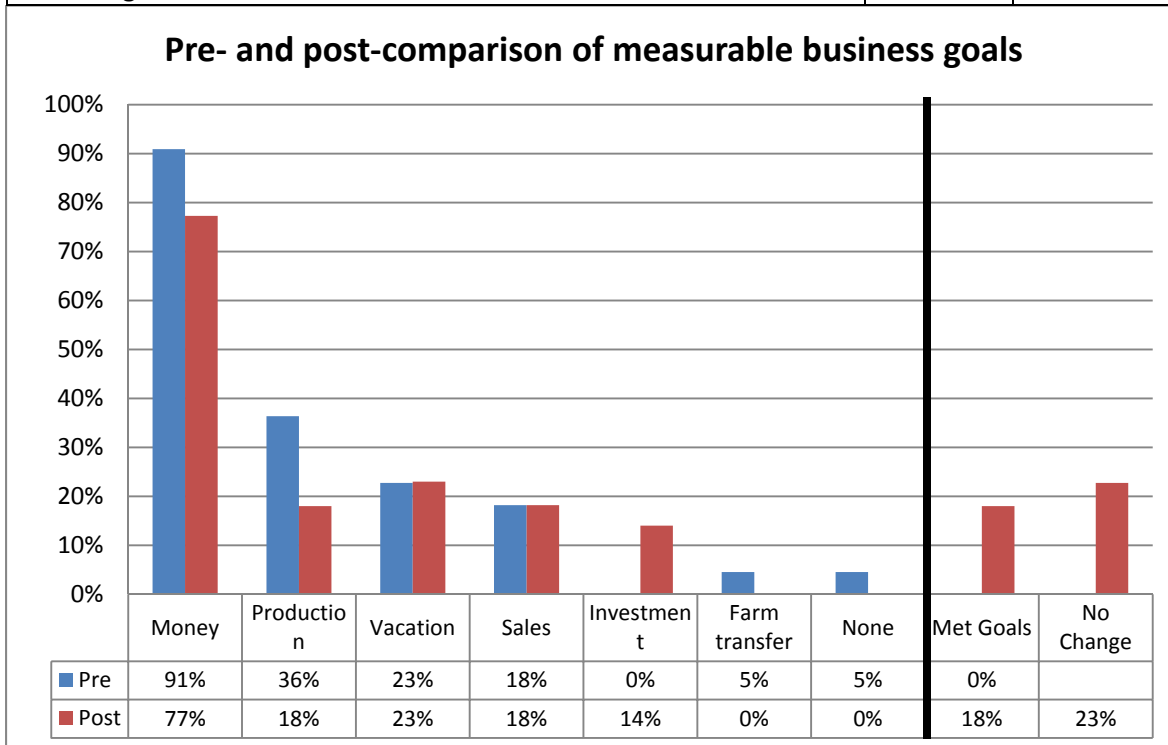
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Q8 Pre Survey: Please list any measurements that you have set as a target goal.

Q8 Post Survey: Reflecting on your response two-years ago, please list any changes in measurements that you have set as a target goal.

Q8 is a text based answer. See Table below for full responses. The chart below was created by sorting text answers into categories. Most farmers had more than one category in their answer on goals. For instance, some farmers had goals of both increased profit and increased vacation time.

Q8 PRE Please list any measurements that you have set as a target goal. (22 responses)		
Total responses	22	100%
Money	20	91%
Production	8	36%
Vacation	5	23%
Sales	4	18%
Farm transfer	1	5%
None	1	5%
Q8 POST -Reflecting on your response two-years ago, please list any changes in measurements that you have set as a target goal.		
Total responses	22	100%
Money—Of the 17 money goals 7 were refined higher and 3 lower	17	77%
Vacation	5	23%
Sales	4	18%
Production	4	18%
Investment	3	14%
Met Goals	4	18%
No Change	5	23%



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	Q8 PRE SURVEY Please list any measurements that you have set as a target goal.	Q8 POST SURVEY -Reflecting on your response two-years ago, please list any changes in measurements that you have set as a target goal.
1	20-25k/yr after farm expenses. We would like to sell at least 10 pigs/yr, 50 broilers/yr, eggs + veggies	Reduce expenses took year off pigs to reset we were just too busy
2	none	Pay myself 10-15% of gross farm income, save at least \$15000 by end of season for annual mortgage and equipment payments, save at least \$3000 to start next year
3	Short-term/2013: \$50k gross sales, over 30 CSA members, 80% retention rate for CSA into following year, production levels that sustain markets June through October. Longterm: \$30k salary, winter time off (4 weeks), 2 full time seasonal employee positions at \$10/hr or over.	2016: 6-week winter vacation time, a day off per week during the season, \$30k salary, 3 full-time employees, have an employee who manages greenhouse operations of the farm, 60% CSA retention, sales growth of 10-20%.
4	\$30K, 6,000lbs of blueberries, 4,000lbs of raspberries, four acres in vegetable production. 5 week vacation. Able to employ three full time workers including myself. Barns built, house built.	NO CHANGE
5	Hard to answer this. Varies depending on the season, the market going to. Empty the cooler on a Saturday/market day, then that's a good week! Means we met our goals for selling our supply; now need to make enough to meet demand—but that's tricky because week to week demand changes. One week they want feta, then next week mozzarella.	I dont remember what we said two years ago, but our goals now are to fit our opetaion to the size of our farmstead. We have become more streamlined in the farmers markets that we do in order to meet this goal
6	550# WEANING WEIGHTS, 100% choice or above \$15,000 salary Carcasses, extend grazing ??scasor to 9 months per year, 100% pregnancy rate, 100% sales of all bulls	\$50,000.00 salary, minimum 110 calves born on-farm per year, double soil organic matter.
7	Goals: 1. start taking owners' salaries in 2014 2. make our full living on the farm by 2016 3. farm gross \$30K in 2013 4. produce 5 acres of mixed vegetables by 2015	Make full living off farm in 2015 Start saving money (for retirement, buying a home...) in 2016. Salary goal is \$35K/owner should allow for saving, but exact \$\$ of savings still TBD employ 1 Full-time year-round employee by 2017 Take 4 weeks vacation/year Work no more than 55 hrs/wk even at peak season (July/Aug) Retain 1 employee annually, even if on very part-time basis Gross \$60K/acre in 2015

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	Q8 PRE SURVEY Please list any measurements that you have set as a target goal.	Q8 POST SURVEY -Reflecting on your response two-years ago, please list any changes in measurements that you have set as a target goal.
8	*not having to work off farm at all *increase net profit/acre/enterprise	not having to work off the farm at all was our goal and we have been able to do that. Our new goal is to set a retirement savings amt /year and attain that.
9	\$70k salary, one summer month of vacation time, 2 weeks winter vacation. A steady income through the winter, 200lbs/week salad and winter greens for sept-dec, march-june. a full time farm manager retained.	NO CHANGE
10	Successfully transfer the operation from one generation to the next and make it work (and not pay it all in estate taxes!!). "It's hard to go into business; it's even harder to get out of business"	no changes. Right on goal. Next goal, get corporation finalized, bring Suzanne (daughter) in as a partner, deserves a piece of the pie, central to operation (bookkeeping). Hard to let go but I have to.
11	Half of our living in \$\$ would amount to \$20-25k annually, which I project would require scaling up to about 4 acres of vegetable/small fruit production (with an equivalent acreage in cover crops).	Not sure what targets I had original, but currently our main # target is a net income of \$20-30k per year after covering expenses and making \$5-15k in capital investments.
12	2 20K salaries, 2 weeks vacation time, profitable egg laying hen operation, profitable beekeeping operation (queen rearing/honey)	1 20K salary rather than 2, we no longer maintain laying hens, a successful agritourism enterprise is our next goal
13	\$15,800 revenue for 2013 (revenue forecast for all product and services done)	Just being profitable would be a good start for us. We have had a very difficult time achieving this.
14	We have our first year salaries set a \$20K each for the two manager/owners. Our per square foot earnings are set at a range between \$1.70-\$2.00/SQFT.	We have scaled back to paying at least one person (as opposed to two).
15	We hope to be able to support ourselves without off farm income within the next 5 years (\$50,000-\$60,000 salary for us). Within 5 years we'd like to be able to pay our production manager year round. We also hope to negotiate longer term leases with our primary landlord to enable better long term planning (we are currently beginning this negotiation.)	Our target last year was to make enough money to pay ourselves year round and not work off farm (we met that goal). Our target for this year is to pay off existing debt so we have a clean slate to move forward.
16	180K gross by 2014 reaching 10 acres in rotation by 2014 CSA retention rate of 66% or higher	We met our goals of 2 years ago. I'd update them. 60K household net 1 day/week off during summer (more reasonable hours, work/family balance) same amount of acreage in production, but on less separate parcels.

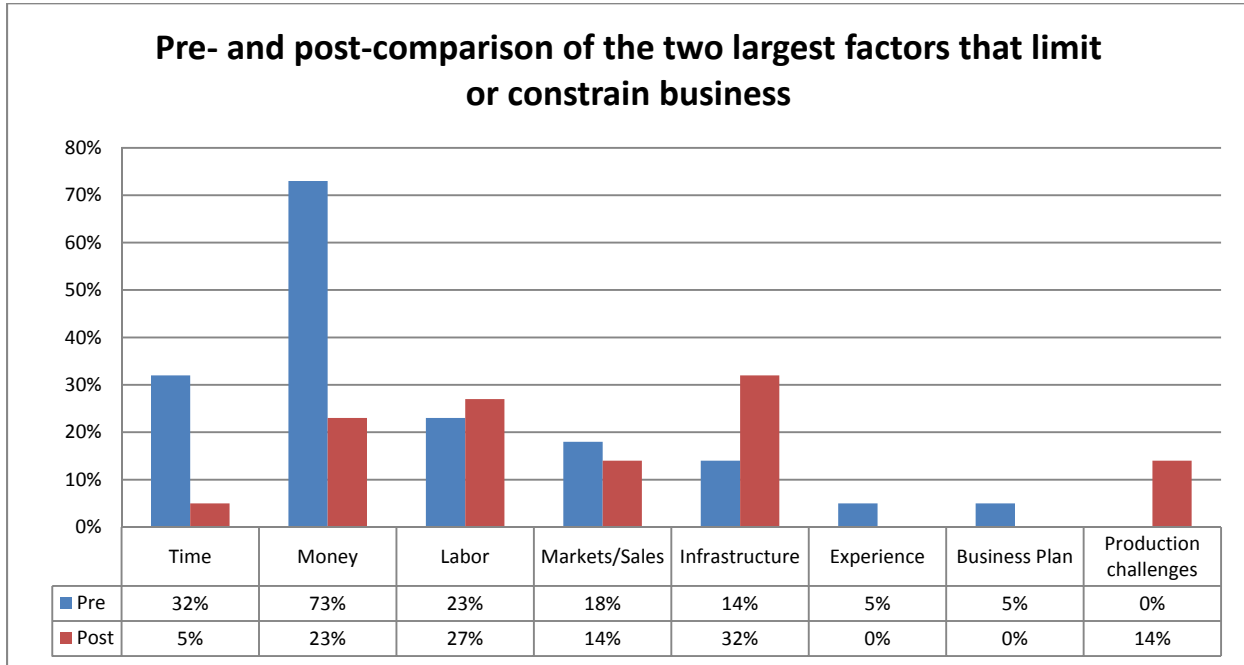
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	Q8 PRE SURVEY Please list any measurements that you have set as a target goal.	Q8 POST SURVEY -Reflecting on your response two-years ago, please list any changes in measurements that you have set as a target goal.
17	We would like to pay ourselves \$20 K each (\$40K total) salary; take 2 week off in winter to visit our families in California, and provide a decent 9 month/ year job for one or two employees.	We'd like to take a higher salary in the next few years (probably \$45K total), and offer good work to more employees.
18	2 goals: 1. To be able to focus on the farm year-round, and move away from having off-farm jobs in the winter 2. To have enough room in our budget so that we have the option to travel, take a vacation once a year, and take time to visit friends and family.	I have made progress toward my first goal! This will be my first winter not having an off-farm job. I am finally going to be able to prioritize the business year-round. My second goal is something we're still working toward (to have room in our budget to have the option to travel, take a vacation, visit friends and family).
19	\$41K profits by Jan 1, 2013	I don't really remember my answers to this question from 2 years ago.
20	Mark Cannella and I are working to set a salary goal... right now I think in the \$35K range would be good. I hadn't thought of setting a vacation time goal, but now that you mention it, at least 2 weeks a year would be a great start.	Salary goals have shifted from \$35K to \$45K. Vacation time continues to be something I have not clearly articulated, in part because it is not solely dependent upon the farm but also upon my off farm employment. I have worked with Mark to evaluate the business in a couple of different ways, including the % of gross income dedicated to paying staff. I'm currently a little high (35%), but not unreasonably so. I'd like to reduce it to 25% by increasing efficiency and sales and maintaining current # of employee hours. This means strategic investments in equipment, and further refining production systems, continued maintenance of farm/customer relationships, etc.
21	1. Secure retirement fund, with increase of \$10K deposited per year. 2. Provide family living for Bob and I. 3. Increase customer base and maintain number of guests who return. 4. Stable or improved income.	NO CHANGE
22	\$30 K salary, 95% retention rate of shareholders, establishing restaurant relationships that are profitable for the farm.	After having a clear picture of my profit/loss for the past two years I have decided to greatly reduce my CSA numbers in favor of more farmer's markets and restaurant sales. These avenues appear to be more profitable considering my farm size, and also require less labor.

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Q9 PRE Survey / Q9 POST Survey

Q9 is a text based answer. See Table below for full responses. The chart below was created by sorting text answers into categories. Most farmers had more than one category in their answer. For instance, some farmers noted constraints of both time and money.



Q9 PRE Survey- Explain the two largest factors that limit or constrain your ability to develop this business.

Total responses	22	100%
Time-7	7	32%
Money—16	16	73%
Labor—5	5	23%
Markets/Sales—4	4	18%
Infrastructure-3	3	14%
Experience-1	1	5%
Business Plan-1	1	5%

Q9 POST Survey Comparing your answers from 2-years ago, explain the two largest factors that limit or constrain your ability to develop this business now.

Total responses	22	100%
Time-1	1	5%
Money—5	5	23%
Labor—6	6	27%
Markets/Sales—3	3	14%
Infrastructure-7	7	32%
Production challenges-3	3	14%

**Attachment I: Compilation of Pre- and Post-Survey Data for
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	Q9 PRE Survey- Explain the two largest factors that limit or constrain your ability to develop this business.	Q9 POST Survey-Comparing your answers from 2-years ago, explain the two largest factors that limit or constrain your ability to develop this business now.
1	If I could refinance my farm it would give us the breathing room we need to be able to reinvest into upgrades for the farm.	money poor credit score need more financing
2	1) cash/financing available to develop ideas, 2) labor force	1) Labor: access to good workers is hit or miss every year. Sometimes we have excellent interns, sometimes (rarely) we have excellent hourly workers, sometimes we have both and sometimes we have neither. We pay well during the season but have a hard time retaining workers year to year. Having good help that doesn't need babysitting would be a huge benefit for the farm. 2) Access to cash: no change here; there's never enough even when you have plenty.
3	Start up capital - I am working with a limited personal capital and relying on some loans. I have access to equipment and facilities but am hesitant to plan on growing on too much acreage initially so my costs are not too large. Limited local markets - though there are avenues for selling product, the lack of widely open markets makes the risk higher and keeps me from striving to be bigger more quickly without established outlets. As a startup I don't know that this is avoidable.	Demand is less of a constraining issue now, but the ability to manage quality while growing more produce has been a struggle.. Largest factors would be the need for another skilled person managing aspects of the farm, I don't have the time to do everything I'd like to. Access to capital now less of an issue but now just figuring out most crucial equipment to purchase for the business. Efficiency is the other big constraining factor and I need to address that with some additional equipment.
4	Cash flow. Having enough funds to start up the business and get everything in place so the operation is more efficient and we can save time on tasks. A business plan so I can approach lenders.	Reliable labor, not having the appropriate infrastructure in place, i.e. barn/packing shed, tractor, food storage facilities, irrigation.
5	1. Capital/having enough money to fully capitalize projects from the outset, get things done all at once, instead of piecemeal. 2. Time and labor. Just the 2 of us; no apprentices at the moment. Only so much time!	Balancing cash flow is always a challenge. We have stopped selling to a distributor- their inconsistent payments were impacting daily operations of the farm
6	Available labor and available capital	Slow internal herd growth, adequate capitalization, high spot in cattle price cycle is inhibitor to purchase of cattle for herd expansion
7	1. We need to work off the farm the support our living expenses, which reduces the amount of energy that can be put into developing the farm business 2. Uncertainty about the future: difficulty predicting market demand, ability to pay off debt. It is a challenge to know how much to invest now, without having experience knowing whether or not those investments will pay off.	1. commitment to quality of life. faster growth = personal sacrifices, and fewer personal funds. 2. labor. limited access to high-quality labor. need workers who can think critically, pay attention to detail, with an abundance of physical strength and endurance. oh yeah, and they need to be willing to live on \$11/hr, which is simply not feasible for many people. the root of this issue is that we can't offer a competitive salary, at least not right now.

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	Q9 PRE Survey- Explain the two largest factors that limit or constrain your ability to develop this business.	Q9 POST Survey-Comparing your answers from 2-years ago, explain the two largest factors that limit or constrain your ability to develop this business now.
8	<p>-time to assess expansion/ efficient options</p> <p>-\$ willingness to support more debt (access to capital doesn't seem like a barrier)</p>	<p>We have just finished two large capital projects. We need to spend the next 5 yrs to fine tune our enterprise budgets in order to utilize the new gh, for example, to its fullest potential. We are 'on hold' with planning for a new packshed until the new FSMA rules are released. If we need to come change our post harvest handling set-up, that could be a major restraint on other expansion ideas.</p>
9	<p>time and money</p>	<p>Time, as a single farmer time can get in the way of expanding.</p> <p>Distance from Markets. I am not interested in doing farmers markets, I prefer wholesale, however that is limiting right now due to distance.</p>
10	<p>#1. Water. Need more water. Has 5 wells, but it's not enough (when one cow drinks 30-50 gallons per day). Before can expand the herd further will need to bring in more water. (interesting note: town water goes halfway up the road, and the town has extended the line for small businesses as they've cropped up along the road; however, the town has said to the farm that they won't extend it up to the farm, since it 'isn't a business'.)</p> <p>#2. Access to financing--until they got connected with CEI (!)</p>	<p>Water still an issue, but has less cattle so less of an issue. Will always have 100 head at all time, so need enough water for them, and have that. Transitioning from dairy to beef now, so finding lots of new benefits, not so many challenges. Less overhead costs--vet expenses, utility bills decreased, day to day expenses, time management easier, has simplified things. Internally, operationally, not any. Lack of ambition and good ideas would be the only limiting factors, which aren't an issue!</p> <p>Dabbling in a lot of new enterprise ideas, don't want to constrain myself or my options at this point.</p>
11	<p>Lack of capital for infrastructure needed to scale up (we are currently hesitant about seeking out financing as we just took on a mortgage and are also paying off student loans).</p> <p>Limited labor and management time - my partner has a full-time professional job and does not have a farming background, so I make all management and day-to-day decisions, which makes implementing new projects/changes slow/challenging, and we do not yet produce enough income to allow for hiring additional workers to free up more of my time for management.</p>	<p>Marketing (developing sufficient direct markets to support the expansion we need and/or making the leap to wholesale) and restoring/maintaining soil fertility to support profitable yields.</p>
12	<p>Our success hinges on our ability to establish a strong market in the Pioneer Valley.</p> <p>Our success is also hindered by being spread thin, as we are a two person operation.</p>	<p>We continue to be a two person operation, operating as two part-time workers because we both generate income off farm. This makes it challenging to manage the farm at times. Reducing our number of enterprises has helped immensely and we'll slowly add in enterprises as we experience success over time.</p>

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	Q9 PRE Survey- Explain the two largest factors that limit or constrain your ability to develop this business.	Q9 POST Survey-Comparing your answers from 2-years ago, explain the two largest factors that limit or constrain your ability to develop this business now.
13	<p>Experience</p> <p>Perennial based crops (e.g. elderberries)</p>	<p>Family relations most certainly affected the success of the business.</p> <p>We started selling wholesale has been successful. The thing that would hold the farm business back from developing it further, would be the availability of crops, specifically elderberry, to produce enough elderberry syrup.</p>
14	<p>Raising the start-up capital.</p> <p>Inexperience in starting a business and creating business plan materials that are realistic and appealing to funding sources.</p>	<p>Scale and value.</p> <p>We need to expand our growing space and/or find a higher value product.</p>
15	<p>We've grown quickly over the last 5 years and have relied heavily on borrowed equipment, labor and general help from friends and family. We're now playing catch up trying to develop systems and acquire the equipment we need to succeed as a business of this size.</p> <p>We've also had only short term tenure on all the plots we use for production and for infrastructure. We are trying to negotiate longer leases so we have a home base for at least the next 3 years.</p>	<p>#1 We don't have complete control of the land we use. We can't make logical moves forward (like high tunnels, a greenhouse located closer to our field, irrigation) because the land is leased and under a strict conservation restriction.</p> <p>#2 We need to continue acquiring scale appropriate equipment to help us work more efficiently.</p>
16	<p>access to land</p> <p>access to investment capital</p> <p>limited skilled labor pool</p>	<p>same!</p>
17	<p>Marketing our produce during summer months has been challenging. Finding, and getting into farmers market where we are able to sell quantity has been difficult as we are new to this area of the state. Because of this we have spent too much of our time going to farmers markets (last summer year we sold at 5 farmers markets per week). This takes away from our time getting important farm work done.</p> <p>Another personal limitation is that we are not natural bosses. We prefer to do work ourselves rather than train and supervise employees. This has meant we have stayed small, and we have overworked ourselves by hiring very little help. We hope to improve as bosses, and hire more help into the future.</p>	<p>Our abilities and interest in being bosses is still a factor (though we're getting better). Winter storage space (for storage vegetables), and 4-season processing/work space is becoming a limiter as we are doing more winter marketing.</p>

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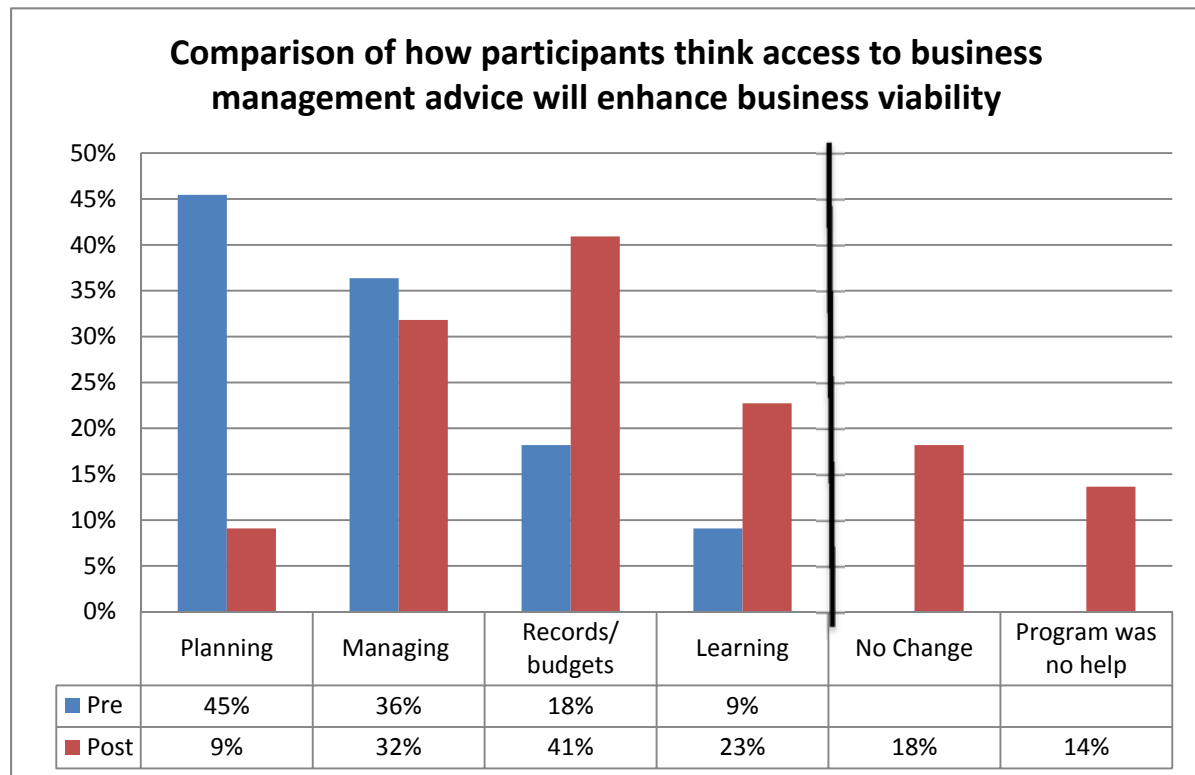
	Q9 PRE Survey- Explain the two largest factors that limit or constrain your ability to develop this business.	Q9 POST Survey-Comparing your answers from 2-years ago, explain the two largest factors that limit or constrain your ability to develop this business now.
18	<p>We just moved our farm to a new location, to a property we purchased in early 2012.</p> <p>1. Access to start-up capital for equipment, infrastructure, and improvements to farm buildings.</p> <p>2. Vulnerability of crops due to weather, pests, disease, and the lack of infrastructure needed to protect them (irrigation, deer fencing)</p>	<p>1. Lack of infrastructure and equipment. We have made some progress (bought a second tractor, put up a second greenhouse, built a cold storage space), but we still have some major infrastructure projects and equipment purchases ahead of us including a new well and an irrigation system, putting in drainage to prepare a site for a large high tunnel, purchasing tillage equipment, building a structure for vegetable washing/packing. Our lack of irrigation water and an irrigation system is our most pressing need.</p> <p>2. Qualified labor. Finding and training new employees has been challenging.</p>
19	<p>1) Lack of sales 2) Finding beef processors who can provide consistent, timely processing</p>	<p>I don't really remember my answers to this question from 2 years ago.</p>
20	<p>The need to maintain my part time job (30-40 hrs a week).</p>	<p>Off farm employment continues to be a big one, though I've recently had more flexibility regarding how much time to spend on the farm in the summers.</p> <p>The next biggest constraint is the (lack of) efficiency in my production system, and the capital investments needed to make those efficiencies happen on the farm. There is always the question of if new tools will be worth the investment financially.</p>
21	<p>1. Volatility of tourism market. 2. Volatility of dairy farm finances.</p>	<p>In addition to answers from 2 years ago, citing volatility in market for both tourism and agriculture. I now must confront the volatility of being a one person business dealing with aging, health issues, family issues. Labor issues--finding and retaining qualified help in a small business is crucial.</p>
22	<p>Capital, and I am running a business with in an already established family riding center and so it is a huge benefit but also a constraint in figuring out how the two work together.</p>	<p>Capital remains an issue but I plan on being more pro-active about seeking grants/loans now that I have a better handle on budgets, etc. At this time I don't feel very limited. The exception is I continue to work with land that has no permanent structures. This creates hesitation in investing in certain tools, etc. as I have very limited winter storage. Building a barn is a potential but as I don't see a financial return as clearly as investing in greenhouses, I'm still hesitant.</p>

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Q10 Access to business management education and advisement-- business viability

Q10 is a text based answer. See Table below for full responses. The charts below were created by sorting answers into the two categories 1) business viability 2) quality of life. The text answers were then further categorized. Most farmers had more than one category in their answer. For instance, some noted that business management education would enhance planning and recordkeeping.

Q10 PRE-Survey Business Viability -How will access to business management education and advisement enhance business viability?		
Total responses	22	100%
Planning	10	45%
Managing	8	36%
Records/budgets	4	18%
Learning	2	9%
Q10 POST -Survey Business Viability -Reflecting on your answer two-years ago, how has access to business management education and advisement, enhanced business viability?		
Total responses	22	100%
Planning	2	9%
Managing	7	32%
Records/budgets	9	41%
Learning-	5	23%
No Change	4	18%
Program was no help	3	14%



**Attachment I: Compilation of Pre- and Post-Survey Data for
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	Q10 Pre Business viability	Q10 Post Business viability
1	Reduce our dependence on purchased food. give our children the farm life experiences and values.	improved riding barn because of extra money and reduced expenses
2	assistance to focus on business management details & principles that are currently underappreciated, poorly understood, or unaware of	I have developed my own tools to help me keep some perspective year to year (eg by comparing how crops/sales were last year vs this year); I also sought independent help with Quickbooks to streamline and standardize my bookkeeping, which has made that process easier to do and more likely to happen during the busy summer season
3	Helpful for better planning, defining roles, and to reduce time trying to figure certain things out on my own.	It has helped, especially in the finance and budgeting areas, but have had less time to do the continued production education I feel I should and feel that my production efficiency needs improvement.
4	It will help with efficient record keeping and financial planning and help me regulate cash flow.	NO CHANGE
5	Business Viability: the loan app process with CEI made us think of the farm as a business and thinking that through. Look at the numbers, show the story of the numbers not just the 'pretty cows'. Increased understanding of the financials, business model. Caused us to ask questions and answer them: "am I asking enough for my cheese?" we increased our prices based on that analysis.	our 'books' are more organized, and we are now using quickbooks for invoicing and account receivables and banking. I feel we need more training on getting the whole business into the program (equipment and assets, etc)
6	I need guidance, particularly on tracking of cashflows and financial management of the business	I've shifted focus from beef production/sales to registered breeding stock production and sales.
7	As much as possible, we need to get things right the first time, especially in terms of business management. We can't afford to lose too much money, or take on unnecessary debt, because our margins are so slim.	As much as possible, we need to get things right the first time, especially in terms of business management. We can't afford to lose too much money, or take on unnecessary debt, because our margins are so slim.
8	better skills in assessing growth opportunities-how to increase net profit	We did not receive any bus mgmt ed or advisement through this grant.
9	it will give me the tools needed to budget and track growth, resources for finding funding, and help me to focus in on the areas that are going to create growth and sustainability	Definitely has made a huge difference
10	[Service providers] lay out the facts, show how the numbers work and how it can pay off a loan—and what the financing needs to look like.	Has not enhanced. Didn't need the advisement on financing, business planning. Understood your operation. Needed to do the TA to obtain financing.

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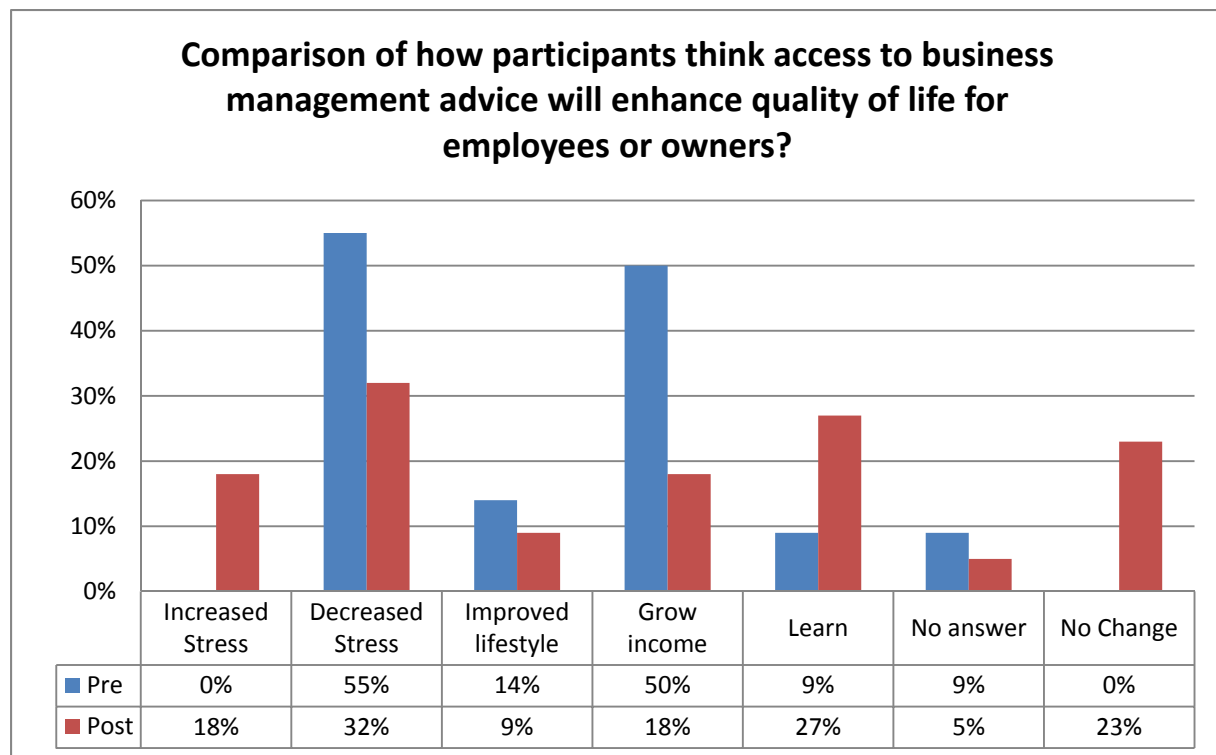
	Q10 Pre Business viability	Q10 Post Business viability
11	help us reach our desired profit level within 3-5 years	YES! business training via MOFGA (as Journeyperson and via Farmer to Farmer conference and publications) has been key.
12	Business management education will allow us to build a stronger plan with measurable goals/objectives. This, in turn, will allow us to pursue financial assistance programs, which will allow us to expand, hire employees, etc.	no answer
13	Slowly learning what it takes.	Increased business viability, although not there yet.
14	It will help in creating financial documents that will appeal to sources of capital and that will help us hone our operations towards viability.	I have a more realistic idea of how hard this is but also have become more focused in how to find ways to make it work.
15	We need help with business management - particularly with accounting and financial planning. As we grow, we are outpacing our skills in these areas. The systems we're using now are inefficient.	We are tracking our financial situation month to month and using it to make better decisions for the business throughout the year
16	facilitate planning and potential applications for financing	better understanding of healthy approach to financing. We are utilizing microloan programs now.
17	With a stronger sense of our business plan and budget we will be better able to make decisions when we're in the thick of growing season.	NO CHANGE
18	I am looking for feedback on the short-term and long-term goals we have set for our business. Also hoping to learn to analyze which crops/activities/markets are most profitable.	I feel more confident about budgeting and setting goals. I sought out the help of a business coach through NHBDC which has been very helpful. I'm still working on gathering data to understand profitability of specific crops.
19	I will learn how to make the business profitable	NO CHANGE
20	Setting realistic financial targets helps me strategize about what I need to do to meet those targets. (Identify strategic investments, etc.)	Yes, given me better targets to shoot for, and a better understanding of financial planning tools.
21	Create efficiency, control costs of production, consistency of reservations through the year, strategic marketing.	need to develop a plan for business transition
22	it will keep me focused on making a profit which is what will ultimately determine if this farm can be successful.	Greater understanding of budgets and cash flow has allowed me to shift my farm in this new direction which I believe will be more financially successful.

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**Q10 Access to business management education and advisement--
Quality of Life**

Q10 is a text based answer. See Table below for full responses. The charts below were created by sorting answers into the two categories 1) business viability 2) quality of life. The text answers were then further categorized. Most farmers had more than one category in their answer. For instance, some noted that business management education would decrease stress and improve lifestyle.

Q10 PRE Survey: Quality of Life- -How will access to business management education and advisement enhance the quality of life for employees or owners?		
Total responses	22	100%
Decrease Stress	12	55%
Improve lifestyle	3	14%
Grow income	1	5%
Better family life	2	9%
Learn	2	9%
No answer	2	9%
Q10 POST: Survey Quality of Life- -Reflecting on your answer two-years ago, how has access to business management education and advisement enhanced the quality of life for owners?		
Total responses	22	100%
Increased Stress	4	18%
Decreased Stress	7	32%
Improved lifestyle	2	9%
Grow income	4	18%
Learn	6	27%
No answer	1	5%
No Change	5	23%



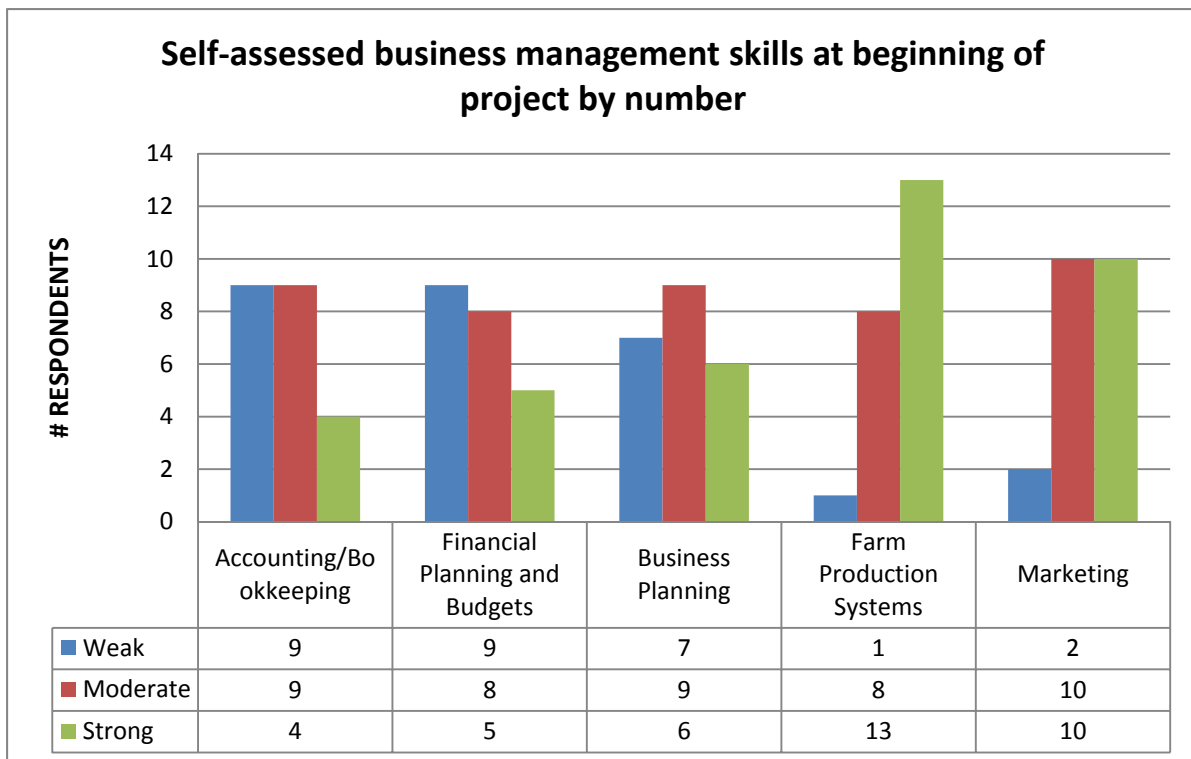
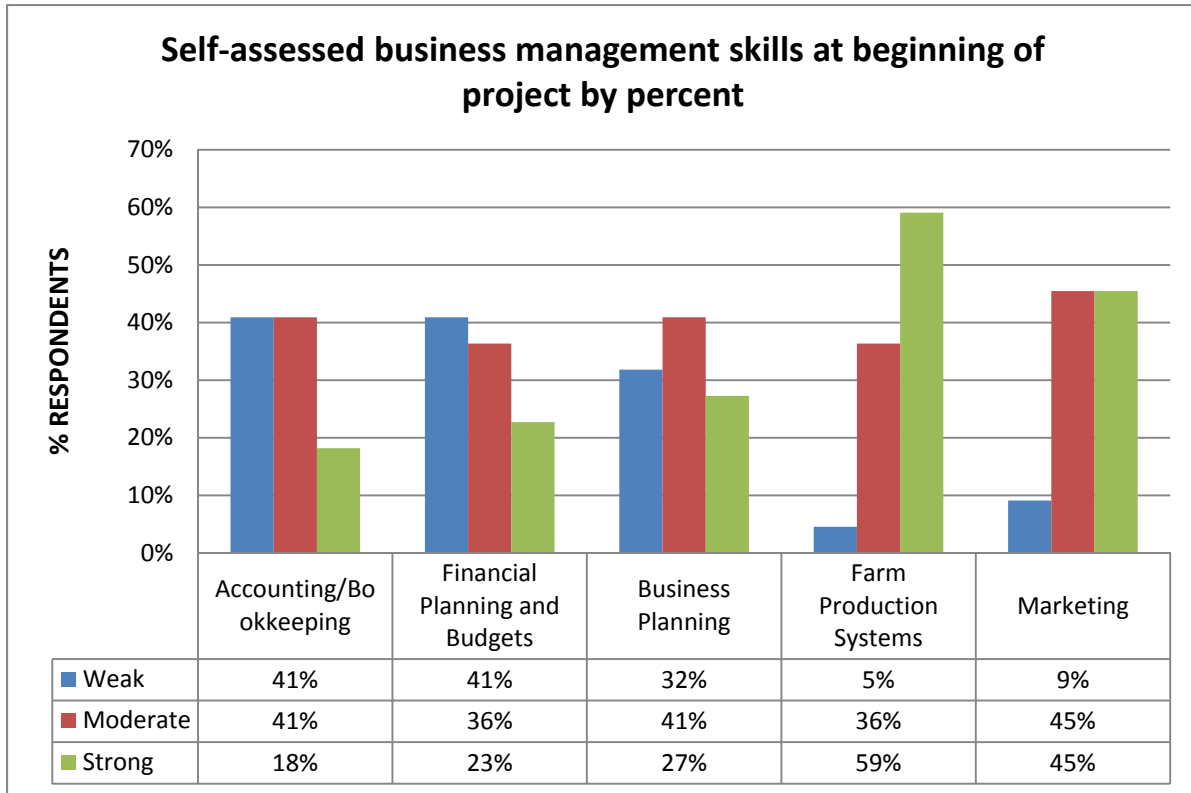
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	Q10 Pre Quality of life	Q10 Post Quality of life
1	Reduce our dependence on purchased food. give our children the farm life experiences and values.	money invested in barn electricity to make operations more efficient save time
2	decrease business and personal financial stress	business and personal financial stress has increased (gotten worse) over the the past two years
3	Less stress in running the business, establishing support system, better use of time.	I do feel more competent in running the business but still feel the stress of all management being done solo, and working too much.
4	Having a well thought out plan will help lower stress. Getting a loan will provide the funds needed to build the farm infrastructure and will make all farm operations easier, which in turn will improve quality of life.	NO CHANGE
5	no answer	we are more organized in the ordering process and can pack orders and set production goals more accurately. I feel good about having the invoicing organized, even there is not always time to keep it up to date.
6	Lower stress and achieve a regular income	Changing focus to the most profitable part of my business and acquiring more capital has allowed me to hire a full-time employee. Freeing me to spend more time with my family and also devoting more time to business development
7	A confident businessperson, running a well-managed operation, has much less to worry about than the farmer who is always scrambling to get a loan or think more than a week ahead. As an employee, it is a pleasure to work for someone who knows what they are doing, and it is highly stressful to work in a business that is always putting out fires.	A confident businessperson, running a well-managed operation, has much less to worry about than the farmer who is always scrambling to get a loan or think more than a week ahead. As an employee, it is a pleasure to work for someone who knows what they are doing, and it is highly stressful to work in a business that is always putting out fires.
8	having better business skills (analysis, decision making etc) will give us more peace of mind and ability to meet our quality of life goals (time with family etc)	We did not receive any bus mgmt ed or advisement through this grant.
9	it will provide peace of mind, take away the stress of not knowing what I don't know. give me confidence to pursue this business knowing that I have some tools to work with/fall back on.	Also, big difference
10	no answer	NO CHANGE
11	help us structure farm labor needs to allow for adequate time off (daily, weekly, annually)	Yes again! MOFGA's Farm Beginnings used the Holistic Management approach and it has been a great framework for us to establish quality of life at the center of our farm plan. We also have hired a part-time seasonal employee who lives locally.
12	Access to business management education will improve our quality of life, because it will	Technical assistance has greatly improved our QoL by giving us tools to track finances and make educated decisions based on financial viability

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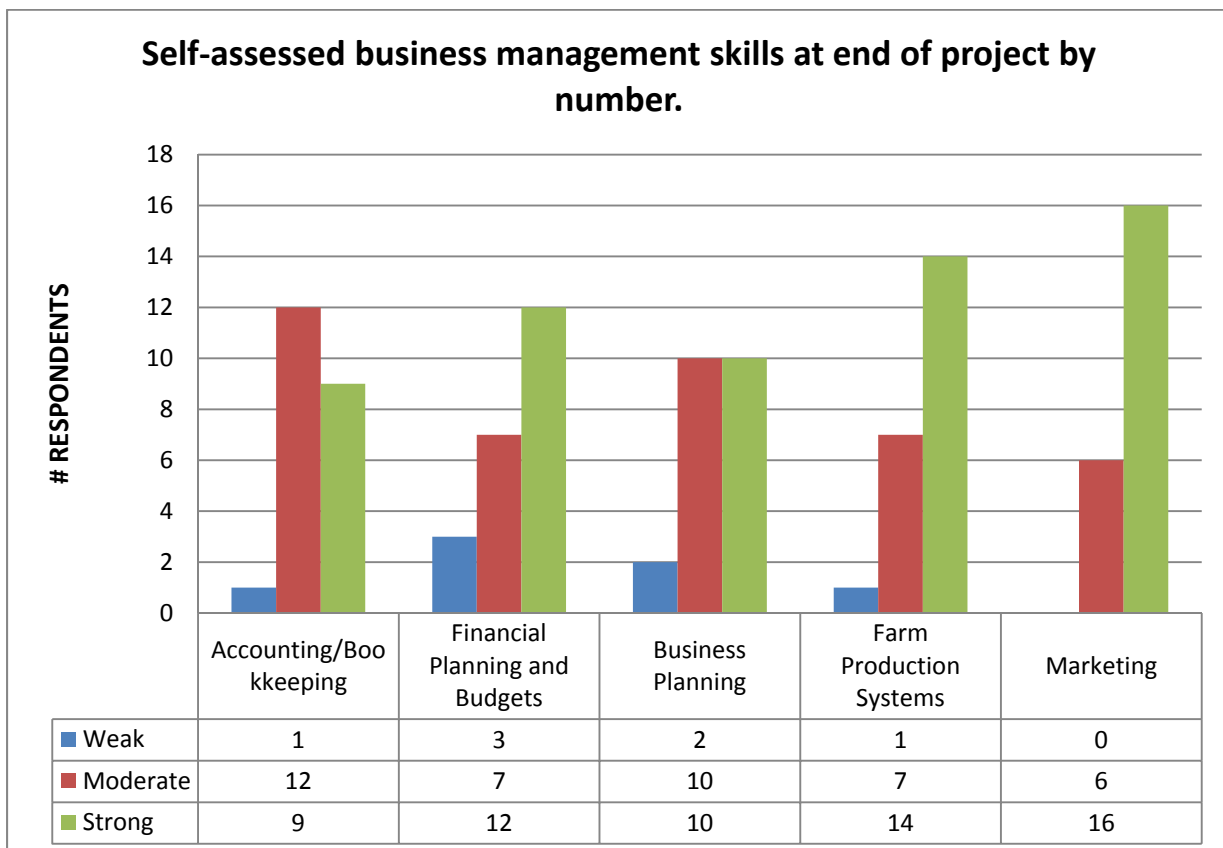
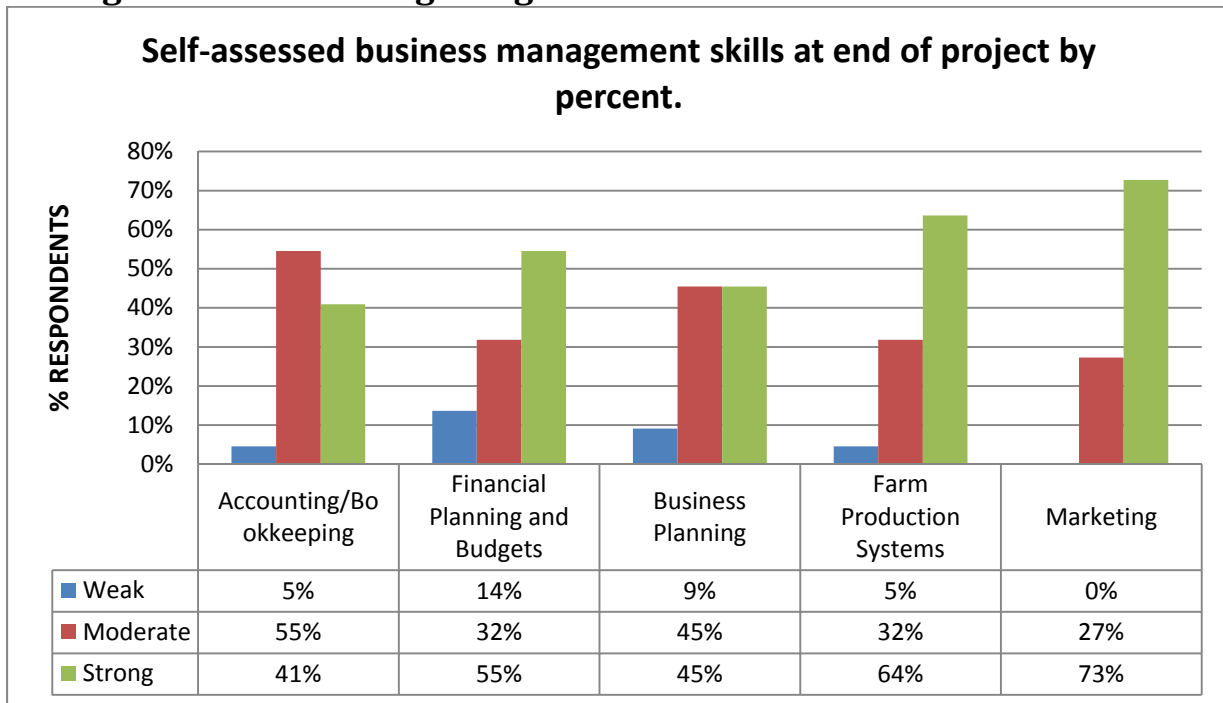
	help us gain financial knowledge and awareness as we grow.	
	Quality of life	Quality of life
13	Starting to work off-farm for additional income, especially in early/waiting stage of perennials.	Some increased quality of life
14	It will alleviate some stress in climbing this learning curve in starting a business.	Its still stressful and sometimes hopeless but also energizing and exciting.
15	We want our entire crew (ourselves included) to have adequate time off and enough money to live on. As we plan for the next 3-5 years we want to make sure we're doing everything we can to make that happen.	We feel more confident and less stressed because we know where things stand with the financial side of the business
16	it will provide time and tools to make decisions that we can feel good about	not sure. sometimes using too many numbers to quantify your life can be off putting.
17	Having more confidence about the direction we are going as a business, and the solidity of our business plan will alleviate some worry and stress. We hope to get to a place where we can work fewer hours during the summer.	NO CHANGE
18	We hope to gain confidence as business managers so that we can reduce stress associated with financial decision-making.	We feel more confident about financial decision-making, but are still working on managing our stress levels associated with running the business.
19	I will no longer have to put my personal cash into the business	NO CHANGE
20	When the business is financially secure, I will be able to fine tune it to allow for time away from the farm, as well as things like retirement savings, etc.. (I hope).	Not yet, but I think there is a lag time - What I've learned will improve my quality of life in future years.
21	Less stress with consistency of reservations on employees and me. Less stress with retirement fund secured.	clarity of focus on securing a retirement fund and planning for future
22	The business aspect of the farm causes me the most stress and takes my energy away from growing, so any help will alleviate this.	Its been a huge relief to be able to ask questions and feel like I am on the right track.

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Q11 PRE Survey: How would you describe your skills as a business manager in the following categories?



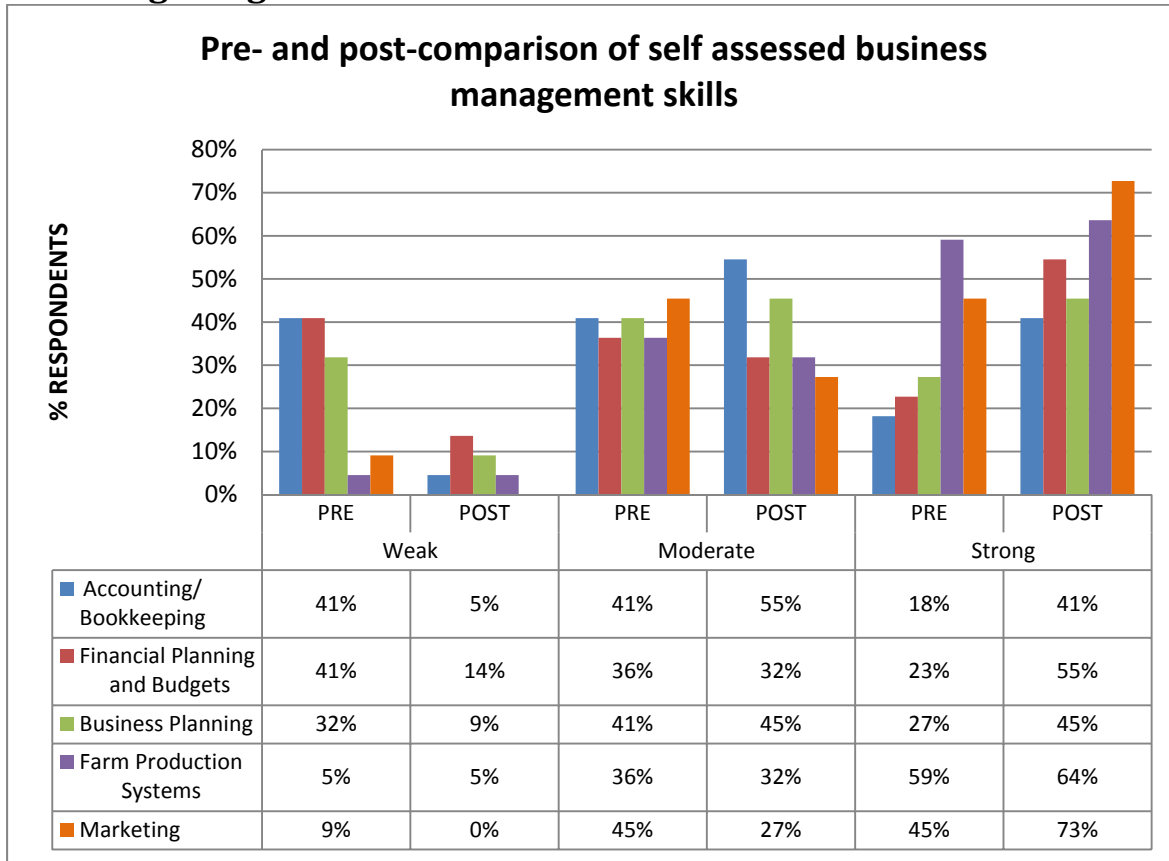
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Q11 POST Survey: How would you describe your skills as a business manager in the following categories?



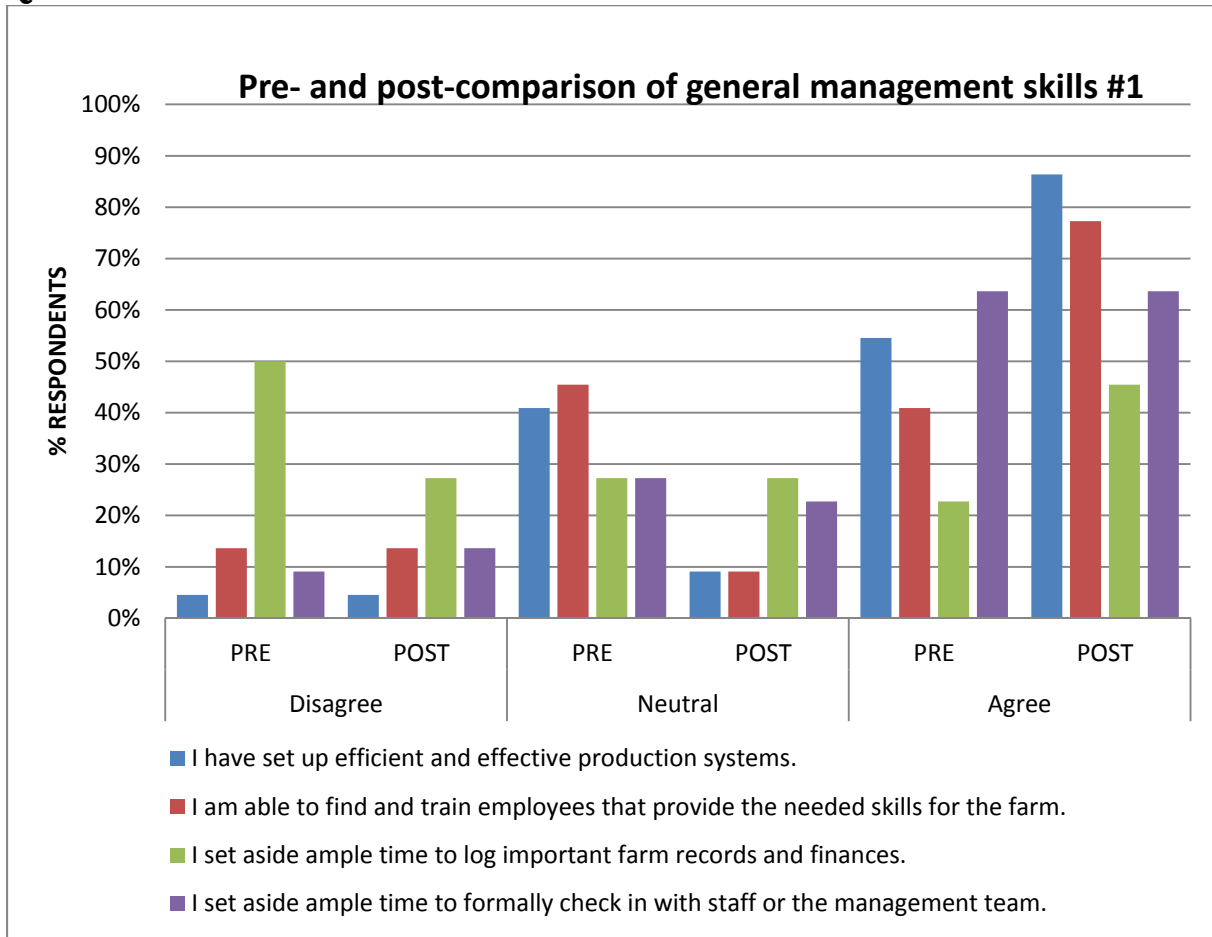
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Q11: How would you describe your skills as a business manager in the following categories?



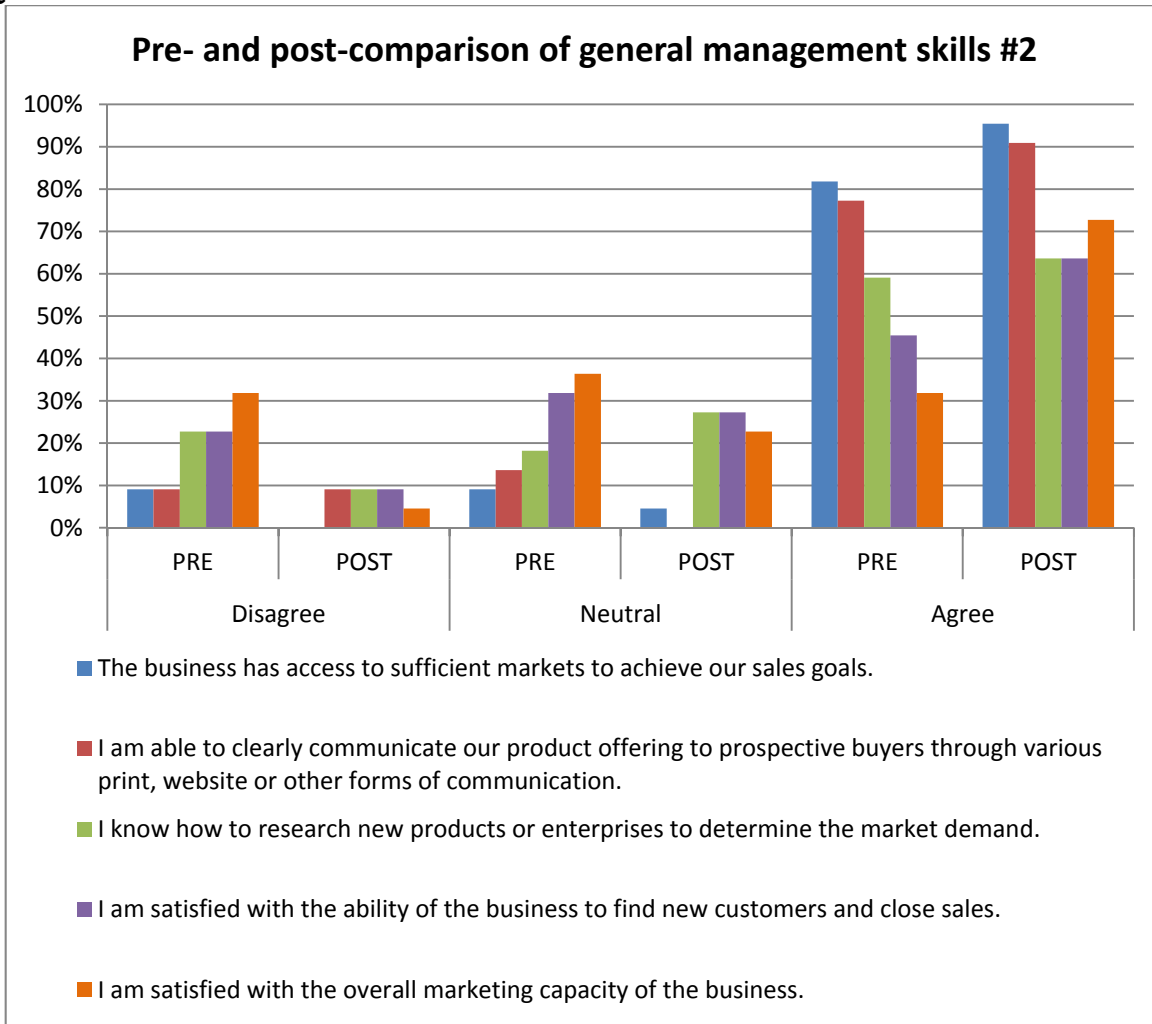
Q11 (N=22)	Disagree		Neutral		Agree	
	PRE	POST	PRE	POST	PRE	POST
How would you describe your skills as a business manager in the following categories?						
Accounting/ Bookkeeping	9	1	9	12	4	9
Financial Planning and Budgets	9	3	8	7	5	12
Business Planning	7	2	9	10	6	10
Farm Production Systems	1	1	8	7	13	14
Marketing	2	0	10	6	10	16

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Q 12 PRE & POST**



Indicate your agreement with the following statements.	Disagree		Neutral		Agree	
	PRE	POST	PRE	POST	PRE	POST
I have set up efficient and effective production systems.	1	1	9	2	12	19
I am able to find and train employees that provide the needed skills for the farm.	3	3	10	2	9	17
I set aside ample time to log important farm records and finances.	11	6	6	6	5	10
I set aside ample time to formally check in with staff or the management team.	2	3	6	5	14	14

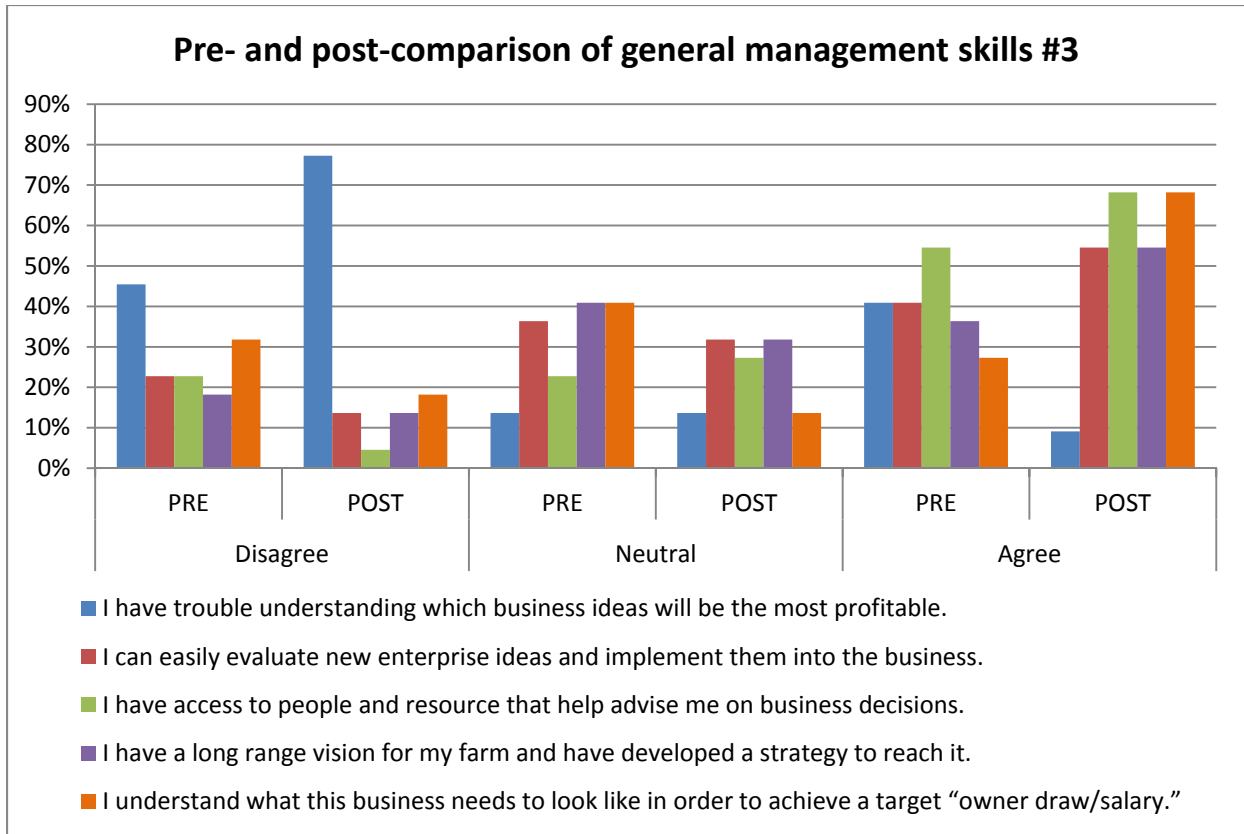
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Q 13 PRE & POST SURVEY



Indicate your agreement with the following statements.	Disagree		Neutral		Agree	
	PRE	POST	PRE	POST	PRE	POST
The business has access to sufficient markets to achieve our sales goals.	2	0	2	1	18	21
I am able to clearly communicate our product offering to prospective buyers through various print, website or other forms of communication.	2	2	3	0	17	20
I know how to research new products or enterprises to determine the market demand.	5	2	4	6	13	14
I am satisfied with the ability of the business to find new customers and close sales.	5	2	7	6	10	14
I am satisfied with the overall marketing capacity of the business.	7	1	8	5	7	16

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Q 14 PRE & POST SURVEY: Indicate your agreement with the following statements.



Indicate your agreement with the following statements.	Disagree		Neutral		Agree	
	PRE	POST	PRE	POST	PRE	POST
I have trouble understanding which business ideas will be the most profitable.	10	17	3	3	9	2
I can easily evaluate new enterprise ideas and implement them into the business.	5	3	8	7	9	12
I have access to people and resource that help advise me on business decisions.	5	1	5	6	12	15
I have a long range vision for my farm and have developed a strategy to reach it.	4	3	9	7	8	12
I understand what this business needs to look like in order to achieve a target "owner draw/salary."	7	4	9	3	6	15

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**Q15 PRE Survey: Describe the education, training or experience that
has prepared you to manage this farm business.**

Q15 Post Survey	
1.	I have been a farm owner/manager for 7 years in NH, and also spent 2 years as a farm manager in southeastern MA. My agricultural training includes 2 years at the UC Santa Cruz Farm & Garden apprenticeship program. Prior to farming, I managed a 6-person staff at a nonprofit agricultural organization in New York City, where I trained staff and volunteers, designed educational programs, and led marketing, communication and community organizing activities. I also have several years' experience as a project consultant, organizing winter farmers' markets and other local food events.
2.	I've been working on vegetable and dairy farms off and on since I was 16. In my adult life, I worked for Butterworks Farm, Does Leap Farm, and Hudak Farm. The folks who ran these farms were very open with helping me plan my own business. I started the farm through the Intervale Center's Farm Program (a business incubator). Through the application process, I got lots of support and feedback about my original business plan, as well as help evaluating how the first couple of years went. I've taken advantage of many classes and workshops (NOFA marketing trainings, UVM Extensions Food Safety training, classes at UVM in food safety for processed foods (HACCP plan development). I work for UVM Extension, and take advantage of crop and production related webinars and training opportunities. I attend workshops (the annual winter NOFA conference, professional growers track, the annual Vegetable and Berry Grower Assoc. conference, etc.)
3.	She has almost 10 years of successful experience owning and operating a respected farm that raises and sells beef in wholesale and retail markets in New England. She received her Master's degree in Organization and Management from Antioch University. She has worked as a school principal for a small alternative school. She also demonstrated superior leadership skills in her work for Hewlett-Packard where she was the lead in the project to consolidate the HP sales compensation program. She is also the Chairman of the Board of Learning Networks Foundation, a 501(c)3 non-profit which provides services to the underserved. She will assist in program coordination, speaking, group facilitation, and outreach to regional beef producers.
4.	I studied Sustainable Agriculture at Umass, and have experience at three very different sized farms/businesses. My family is all self-employed and so I grew with an understanding of costs/profits etc. I've worked in the food industry(restaurants, cafes, managed a specialty food market) and feel that I have a thorough understanding of what the customer wants.
5.	I have been farming for ten years and running my own farm operation for four years. I, however, have been leasing land on an inefficiently run farm and now have my own land to start up my own operation. I have taken several workshops and trainings through the UVM Extension program, NOFA VT and a various of other organizations to gain the skills needed to run an effective business.
6.	I have been involved in food systems policy work for a number of years via the non-profit sector and I have a Masters degree in Food/Agriculture Policy. I also have writing/office/computer skills that have helped in creating presentations and giving presentations to landlords and others, building our website, writing our business plan, creating Excel spreadsheets. I also have connections to the food and agriculture world through my previous/existing employment and education, and have a modest amount of farming experience. My partner has 5 years of farming and CSA management experience. She has also been a restaurant manager for five years. This gives us business/farm operational experience as well as a close personal connection to our market.
7.	I have attended available workshops and conferences over the years. Mostly I have learned by being in the business for over 28 years.
8.	Attended the Beginning farmer program thru Cornell Coop Extension in NY before starting the dairy in NY. 15 week program. Hobby farm started 1998. Started dairy in NY in 2006 after the Cornell class. Have also done business mgmt workshops and training. Went to farm-management and livestock mgmt, dairy production, etc. workshops.

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Q15 Post Survey	
9.	Grew up on the farm. Learned from my dad, uncle, and other family. I spent 10 years off farm doing carpentry and machinery work, but came back when I realized I wanted to go back to farming. Been at it over 40 years.
10.	We do have experience farming, this will be our second season working on a small scale farm (for more information see below). We also have 3 years experience "urban farming"- reclaiming abandoned lots in the city and turning them into permaculture inspired orchards/edible landscapes. We have had great success with this, and the city is helping a group of our neighbors buy the land to put into a land trust over the next year. We've also grown annual vegetables in community gardens and a backyard plot for the last 5 years. Brian has taken courses with the New Entry Sustainable Farming Project. He will take a Soil Health course at UMass this winter, we will both be taking a "growing nutrient dense food" course with Dan Kittredge this Fall/Spring. I have been keeping bees for 2 years in New England, and as mentioned below have mentored under two organic beekeepers locally, and attended conferences biannually. We both hold a Masters in Education, and aim to conduct educational workshops for children and adults as we move forward. Our mutual dream is to run a small education center on the farm using farming as a tool for teaching curriculum in an integrated way.
11.	BS plant science Cornell University (2000?) Job experience 7 years with cooperative extension and HMRCD 5 years, trade journals a reader and now as an author/writer
12.	We spent 5 years managing another organic farm. We're pretty good on the farming aspect of managing the farm business. Not so good on the business management end, though we did do a fair amount of budgeting work at that farm. attended a farm budgeting workshop through CRAFT. We got some basic consulting on making a cash flow forecast through the MEGA grant program. ran his own business (edible landscaping) a number of years ago that gave him a little bit of relevant experience.
13.	has a bachelor's degree in Plant and Soil Sciences and a Master's in Education from the University of Massachusetts Amherst. She apprenticed on an organic vegetable farm (Keith's Farm in Westtown, NY) after graduation. She also works closely with other local farmers, collaborating whenever possible, and participating in farmer to farmer educational opportunities. has a background in retail sales. She excels at merchandising and assessing new enterprises for the farm.
14.	I have a liberal arts degree and experience in non-profit management, event planning and marketing/graphic design. I completed two apprenticeships on organic vegetable farms at different scales in 2009 and 2010. In 2011, I worked part-time for one of those farms and a third farm while growing my own large garden for personal use and self-education.

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Q15 Post Survey	
15.	<p>BUSINESS EXPERIENCE</p> <ul style="list-style-type: none"> • 25+ year web/IT entrepreneur and consulting professional. • Excellent project management, facilitation, training, and organizational skills. • Experience with entrepreneurial ventures including Co-Founder, Vice President of Product Management, (2004-2008) and Vice President of Product Management, (2007-2008), and Independent Consulting (1984-1989, 2001-2004, 2009-present) <p>EDUCATION - AGRICULTURE</p> <p>2012 THE CARBON FARMING COURSE, GAIA UNIVERSITY Chestnut Ridge, NY Cutting-edge agricultural practices with the tools of ecological design to build healthy soil and profitable farms. Holistic Management, Keyline Farming, Perennial Agriculture, Agroforestry Business Planning, and Living Soils. Courses taught by many world leaders in their fields, including Wes Jackson, Darren Doherty, Elaine Ingham, Joel Salatin, Dave Jacke and Eric Toensmeier. See carbonfarmingcourse.com</p> <p>2011 - present UNIVERSITY OF VERMONT EXTENSION Central Vermont A variety of agricultural and farm management courses including business planning (Growing Places, Building a Sustainable Business), financial management (Introduction to Ag Financial Management), Master Gardener certification and Master Composter certification.</p> <p>2011 PERMACULTURE DESIGN CERTIFICATION Moretown, VT Permaculture Design Certification at Whole Systems Design Research Farm.</p>
16.	<p>I have had seven seasons of farming experience, including a season working on a farm adjacent to the site of my current farm; have a knowledge of local pest and disease pressures and market opportunities. I have worked on scales from two-acre to 25-acres. I have overseen production planning, record keeping and analysis, and produce marketing, and planned and implemented infrastructure improvements - greenhouse construction, irrigation system installation, orchard installation, field planning.</p> <p>I have managed farm crews of three to five; and run an apprenticeship program that included field instruction, classes, and farm visits. I have directed all types of field work, including cultivation, irrigation, planting and harvests, and coordinated harvests and packing. My commodity experience covers a wide array of mixed vegetable crops, cut flowers, stone and pome fruit, berries, and dry beans. I have animal husbandry experience with laying hens, sheep, and broiler chickens. Additional farm related skills include tractor operation, irrigation plumbing, basic carpentry, electrical, and welding.</p> <p>I have four years experience coordinating a CSA program (85-members, \$70,000 annual sales). I have five years experience doing sales to retail and restaurant accounts (~\$45,000 annual sales).</p> <p>And I have two seasons coordinating harvests for a farm stand (~\$35,000 annual sales); one season coordinating farmers market sales (~\$150,000 annual sales).</p> <p>In terms of business planning, I have five seasons of farm production planning experience, including crop planning and seeding schedules. I spent three seasons assisting with farm operation budgeting and cash flow projections.</p> <p>Lastly I have seven years building a reliable network of experienced farmers on which to rely for information and advice.</p>
17.	<p>I have 20 years of horticultural experience and business ownership, I have taken a course through UVM extension on business sustainability, I attend seminars on various farm practices and I study/read about the kind of agriculture i am interested in developing on my farm.</p>
18.	<ol style="list-style-type: none"> 1. bachelor and masters degrees contribute communication and analytic skills 2. 1.5 years of farm apprenticeship, including 1 full year on a similar farm to the one we are building 3. mentorship (MOFGA Journeyperson program) for two years with farms similar to the one we are building
19.	<p>Farm apprenticeships, farms for the future, MOFGA Board of Directors, Janet Roderick's help, Town government involvement</p>
20.	<p>bachelor's degree apprenticeship 2003 MOFGA's journeyperson program 2005-6 10 years experience farming, 9 of them running own operation</p>

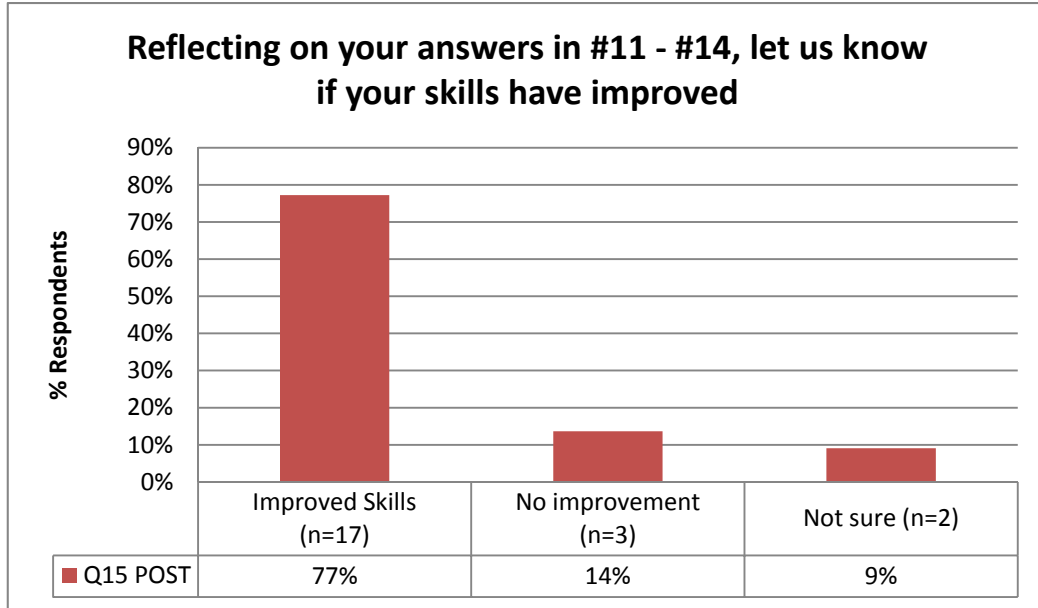
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Q15 Post Survey
21. I grew up on a dairy farm and I have owned my own farm for 9 years.
22. on the job training, SBDC advisors, FSA load requirements

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Q15 POST Survey: Reflecting on your answers in #11 - #14, let us know if your skills have improved and why or why not?

Chart below was built from text data answers to question 15 from the post survey. Full text answers are below the chart.



Reflecting on your answers in #11 - #14, let us know if your skills have improved and why or why not?
1. yes, understanding financial situation of different ideas
2. I think that my skills have definitely improved, but I also feel that my understanding of what I want from the farm is changing and that, without a strong grasp of what I want in the long term, I am left feeling frustrated with all of the short term decisions/successes/failures. So although I am getting better at what I do, I am expecting more and more of myself every year which and so my satisfaction is falling behind.
3. Skills have definitely improved but need to delegate more of the management to allow me to better stay on top of record keeping and continuing to educate myself on production areas.
4. I have ample markets and customers to meet the farms financial goals, but I can not find the necessary help to meet these market demands, and therefore can not earn enough to reinvest into building the farm infrastructure.
5. we still struggle with figuring the profitability of products. Finding markets has not been a problem, but finding time to deliver to them is
6. Skills in these areas have largely improved through the business/social circles I travel in
7. Yes overall my skills have improved. I have learned by doing, with insight from other farmer mentors.
8. I have logged "NO CHANGE" on all of these questions because we did not receive any education or advice through participating in this grant. In truth, our skills have evolved and improved across the board but not significantly and not due to any programs or people associated with this grant.
9. I'm much better equipped to make a budget and plan to reach sales targets thanks to Mark Cannella.
10. stayed the same.

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<p>Reflecting on your answers in #11 - #14, let us know if your skills have improved and why or why not?</p>
<p>11. Enterprise budget training (and actually making the time to work on them on my own time) has been very helpful.</p>
<p>12. Our skills in analyzing enterprises and developing a long range goal have improved due to technical assistance, courses and workshops we've participated in.</p>
<p>13. Our skills have definitely improved in evaluating business viability, record keeping, marketing, and sales. With that said, we still have a long way to go.</p>
<p>14. Yes, they have improved through experience and gaining clarity on our business but I have a long way to go.</p>
<p>15. We definitely know where we are heading and what we want the business to look like. Now we are searching for an appropriate piece of land that will let us create it.</p>
<p>16. Our skills and knowledge of resources have improved. The inherent types of challenges we face means that my answers didn't vary much from 2 years ago, but I sincerely feel that my skill set, competence and resilience have been enhanced.</p>
<p>17. I do feel better able to evaluate business ideas. But the wide range of possibilities for what directions to take the farm can still be a bit overwhelming and hard to compare and settle on which to pursue.</p>
<p>18. I feel more confident in my recordkeeping and budgeting skills, but I'm still unrealistic about time management. "Administrative" tasks including bookkeeping, paying bills, marketing, communication, etc. could still use more attention.</p> <p>We are 3 years into farming at our new location, and it seems like it's time to update our business plan to reflect the realities of our current situation. On the one hand, I'm encouraged by the fact that we are growing and selling more food than ever before. On the other hand, our profitability has not improved much, and it feels like something significant needs to shift in order for us to move forward. Continuing to invest in the business infrastructure feels scary when we are not advancing very far down the path to profitability.</p>
<p>19. I don't really remember what my answers were two years ago. But two years ago I was employed full time with HP and now I am not. I have decided that, now that I am retired from HP, I am the best sales person for the business, but this knowledge did not come as a result of this program.</p>
<p>20. My planning skills have improved, but long range planning feels like trying to tell the future by looking into a crystal ball. There are big questions to answer, like whether to grow the market for my products in VT, or look outside the state. That question wasn't on the table at the beginning of this process, but if decided to pursue the later, it could radically change the farm. I have a better understanding of what steps I would need to make that happen, but I do not know that I want to.</p>
<p>21. I do spend more time with keeping financial records and more time on marketing efforts in the past 2 years. I also feel that I am constantly striving to improve. Working with a farm management consultant has improved my confidence and perspective on my business.</p>
<p>22. I have a much firmer grasp on evaluating budgets/cash flow. I still need to invest time in understanding the tools that will help me, such as quickbooks and excel. I can now more quickly evaluate where my time is best spent regarding marketing and record keeping.</p>

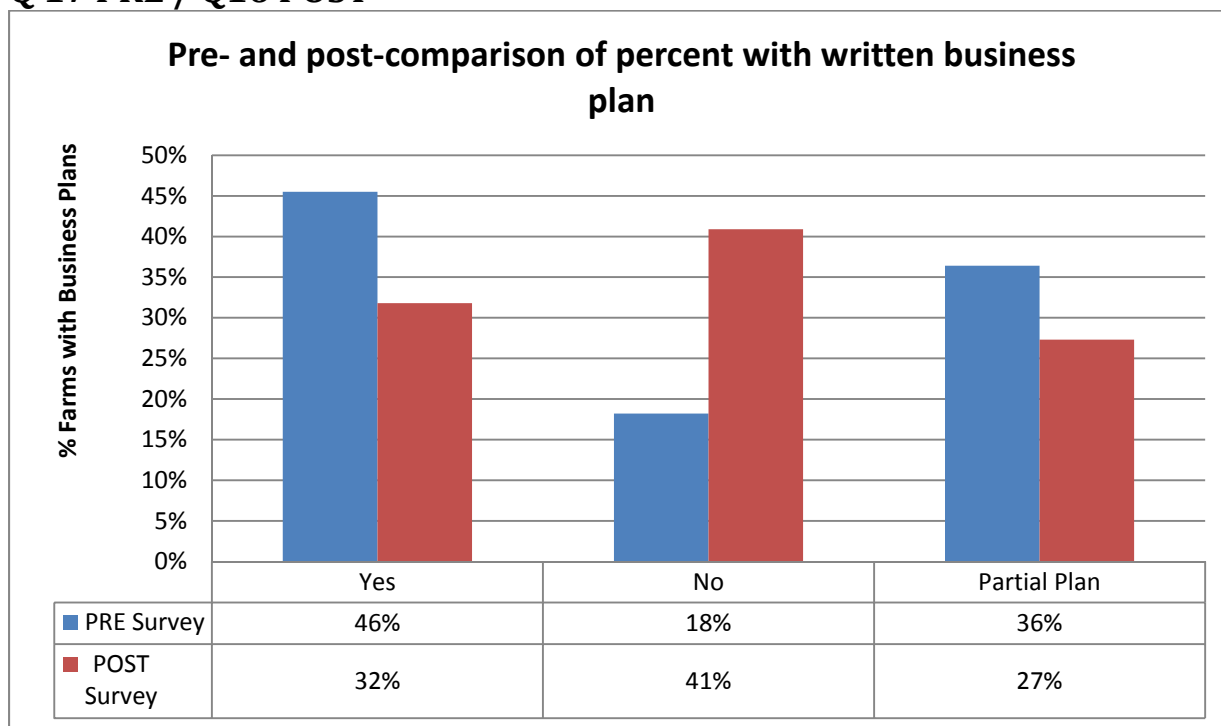
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Q 16 PRE Survey: Describe the activities that others provide to the farm, e.g. Custom equipment operation, tax preparation, marketing materials, etc.

Describe the activities that others provide to the farm
1. We have just started using Farm Credit East's payroll service.
2. I work with 2 book keepers who check in on me 1x per year... one handles everything not related to employees, and the other handles the employee related stuff. Paul B is a CPA who prepares my taxes. I work with Champlain Equipment to handle tractor repairs I can't do myself. Giroux's body shop does welding work for me. Great Big Graphics in Morrisville designs and prints my labels.
3. Tammy Boucher - PR, Kim Hennessey - Accountant, Steve Chagnon - Sales, Microease - Marketing materials, Venly - Social Media adviser, FSA - Loans, USDA - Grants, NH Dept of Ag - Grants, SARE - Grants, Merrimack County Conservation District - Farm Advice
4. All my web presence is provided by my boyfriend. I essentially do everything else.
5. I hire a equipment operator to plow, bush hog, spread lime and do excavating work/drainage if needed. I also hire a tax preparer, but do all the marketing and book keeping myself. As my business grows I may look to hire someone to build a website, do the marketing and help with the book keeping. I will also look for some one to help prepare value added products such as jams and frozen berries.
6. We have a lawyer who has advised us on some business matters as well as handled our lease negotiations. We have PR advisors who are helping us with fundraising initiatives. We have green roof designers/installers that advise us on building suitability and green roof material suitability. We have a structural engineer to advise on loading capacity for our roof. We plan to hire a bookkeeper and are currently choosing a bank.
7. I hire website design service and web provider service. I hire tax preparation service.
8. Some custom work—bale wrapping, putting up hay. Tax preparation. We kind of do everything...
9. Tax preparer/CPA. We do all else
10. Land owner assists with equipment rental/operation & land lease/livestock partnership Land owner assists with soil health consultation Meryl LaTronica assists with crop planning, general daily inquiries. Jean Claude Bourutt assists as beekeeping mentor and advisor. Other farmers provide resources and advice about operations, systems development, etc.
11. Tax prep by Nolan & Dickinson, CPA, Legal help by Ed Gorman Attorney at Law, Hay supplier by other farmers, Veterinary practice by Battenkill Bovine Vetterinary, PC Dr. Shelley (Candonksr?)
12. We did have an accountant do tax preparation for us last year. We had a graphic designer friend make a logo for us that we turned into banners, business cards etc.
13. We use a professional for payroll and tax preparation. We also hire other local farmers for tractor work since we don't have our own tractor.
14. A custom operator does all of our tillage and cover crop management for vegetable fields (currently about 20 hours/yr). A neighboring farmer mows the remaining field area in exchange for the hay it produces (currently not much). I have a farming mentor through the Journeyperson program who visits occasionally and provides production advice when needed. My parents volunteer for infrastructure projects.
15. Tax preparation - Sullivan Powers Company, Montpelier Legal - Mark Grosby
16. Marketing materials and graphic design assistance from a friend who is a graphic designer (free). Tax preparation from an accountant (paid) Equipment to lease from a neighboring farm (paid)
17. I have an accountant that does all tax and payroll preparation, a group that manages website/creating flyers for marketing,
18. We outsource: 1. tax preparation 2. primary tillage 3. LLC filing 4. legal counsel for farmland lease negotiations. We are considering outsourcing 1. lime spreading, We are also helped with... 1. Business planning, from our SCORE mentor
19. Tax Prep, SBDC Coaching from Janet Roderick, Forestry Mgmt, earthwork
20. custom equipment operation - earthwork, primary plowing
21. tax preparation
22. CCA services, equipment repair

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Q 17 PRE / Q16 POST



Q16/Q17	YES	NO	PARTIAL PLAN
Response Count PRE	10	4	8
Response Count POST	7	9	6

Q 18 PRE Survey / Q 17 POST Survey:

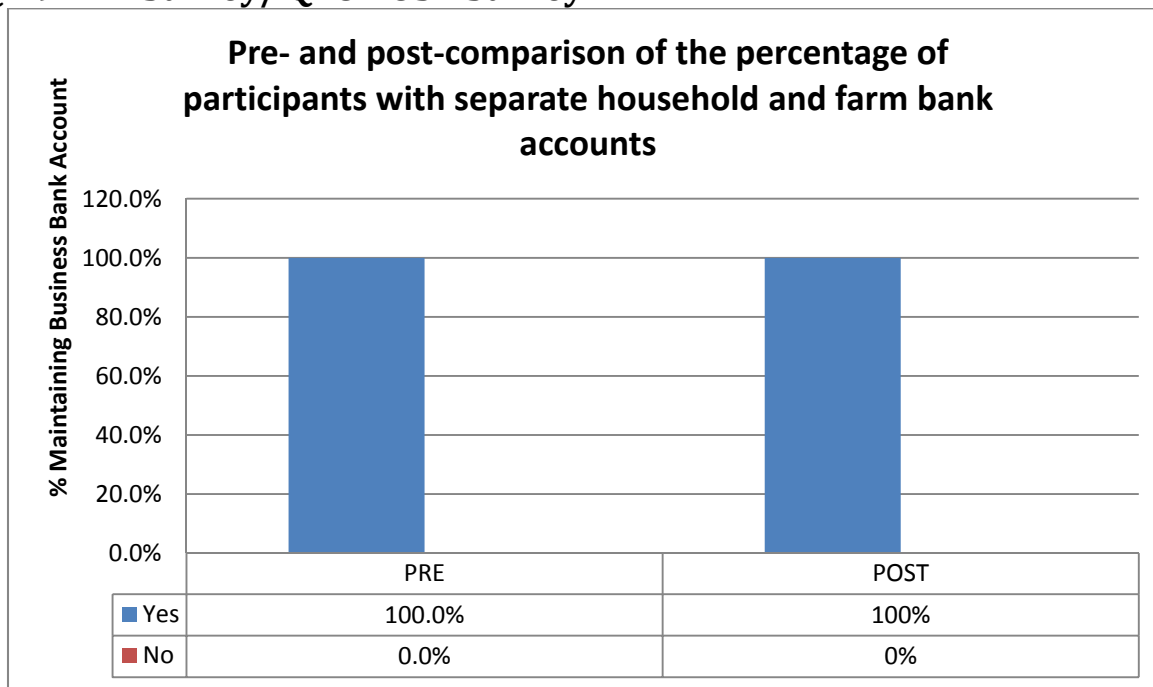
Combined list of names of programs and consultants used to assist with developing business plans

Person or Program	Date
Mike Sciabarassi, UNH Cooperative Extension	06/01/2011
Intervale Farms Program (Mandy Davis)	2009
Linda Davis	Sept 2011
Tilling the soil of opportunity UVM Extension	1/09 -3/09
AgPlan, https://www.agplan.umn.edu	01/01/2011
Carla Booth, CEI	2011/2012
New Entry Sustainable Farming Project Business Planning Course	12/01/2011
Cornell Small Farms Program, Erica Frenay	11/01/2011
Ernie Fisher, consultant through MEGA	winter 2011/2012
Julia Shanks (via MDAR MEGA grant)	02/01/2013
MOFGA Farm Beginnings/Journeyperson Program	in progress

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Person or Program	Date
Conner Soderquist - consultant	2011
UVM extension course "building a sustainable business"	01/01/2012
Ron Dillon, SCORE (Portland, ME)	2012-present
Farm for the Future	2007-2008
Brad Swanson	winter 2011-12
Phyllis Van Amburgh, Savory Institute HubNY	October 2014-present
Mike Kastputes and Janet Roderick- SBDC	winter 2013/14
UVM Extension, Mark Cannella	

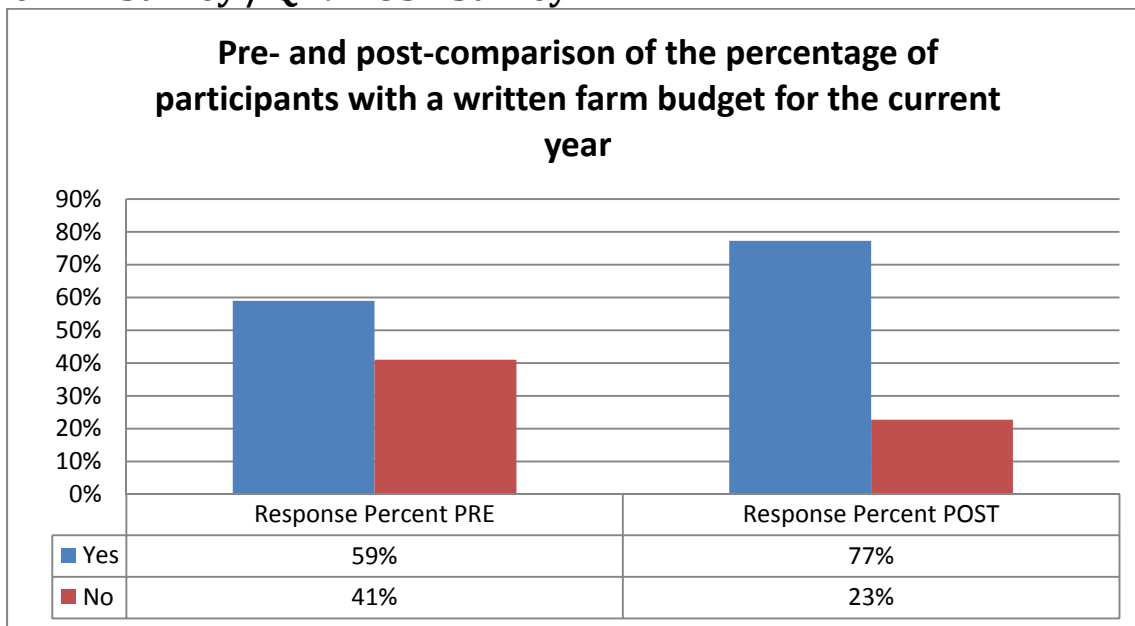
Q 19 PRE Survey/ Q18 POST Survey:



	Response Count PRE	Response Count POST
Yes	22	22
No	0	0

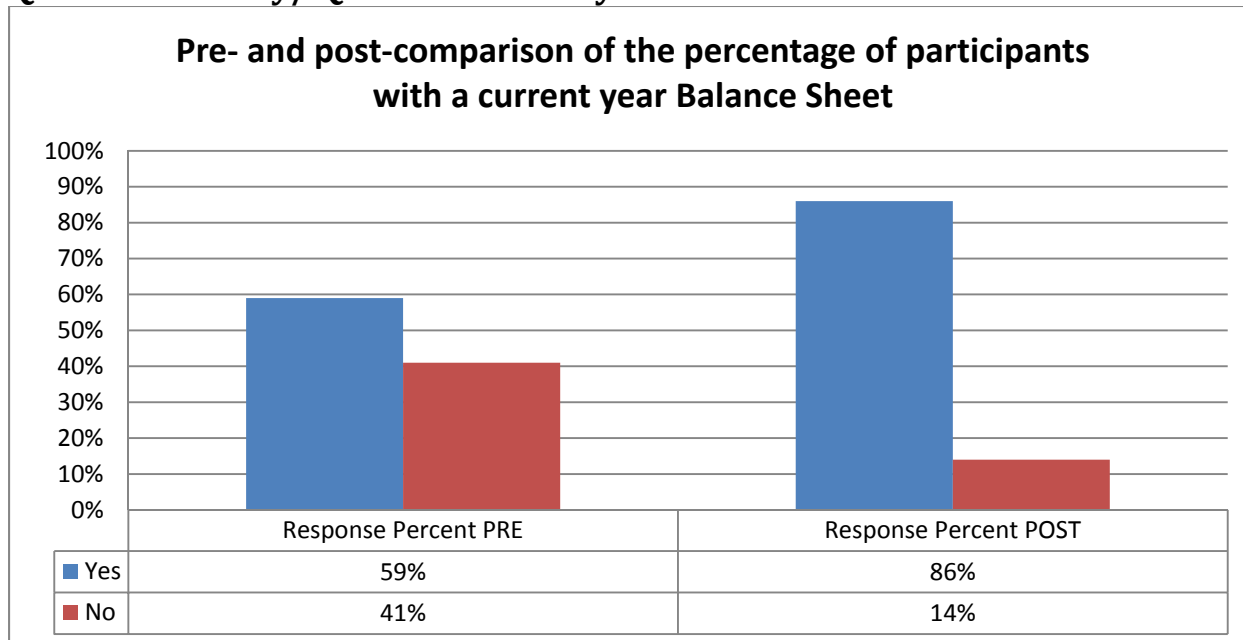
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Q 20 PRE Survey / Q19 POST Survey:



	Response Count PRE	Response Count POST
Yes	13	17
No	9	5

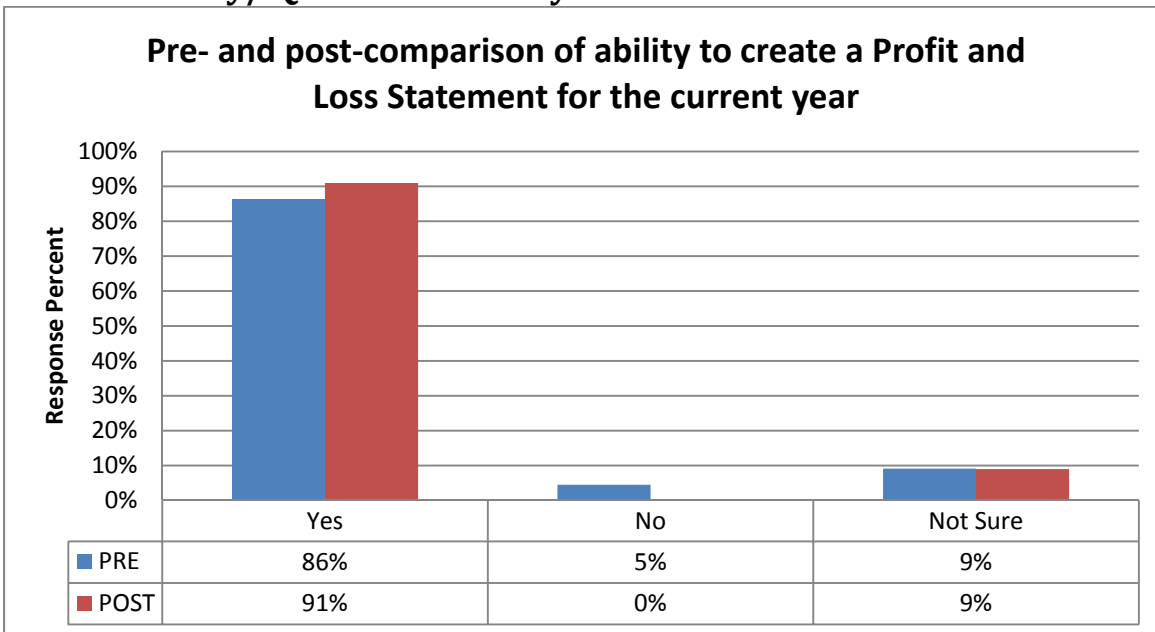
Q 21 PRE Survey/ Q20 POST Survey:



	Response Count PRE	Response Count POST
Yes	13	19
No	9	3

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Q 22 PRE Survey/ Q21 POST Survey:



	Response Count PRE (Q22)	Response Count POST (Q23)
Yes	24	16
No	3	0
Not Sure	3	1

Q 23 PRE Survey: If you answered “yes” to Question #22 how long would it take you to produce this statement?

(N=20)

1. We've just completed it for our business plan
2. completed
3. not long - have already generated for self-review
4. immediate
5. just need to print it out
6. 2 minutes, I have it in quickbooks
7. 2-3 minutes
8. 5 minutes - it's in Quickbooks
9. 10 minutes
10. 30 mins
11. a few hours
12. 8 hours
13. 1 day--daughter could generate it, or the CPA
14. a day
15. A week
16. 1-2 weeks
17. 2 weeks
18. 6 weeks (need to transfer all info into Quick Books, which is a new record keeping system for us as of this fall.)
19. We don't have a previous year of operations.
20. n/a - projected only, first year in business

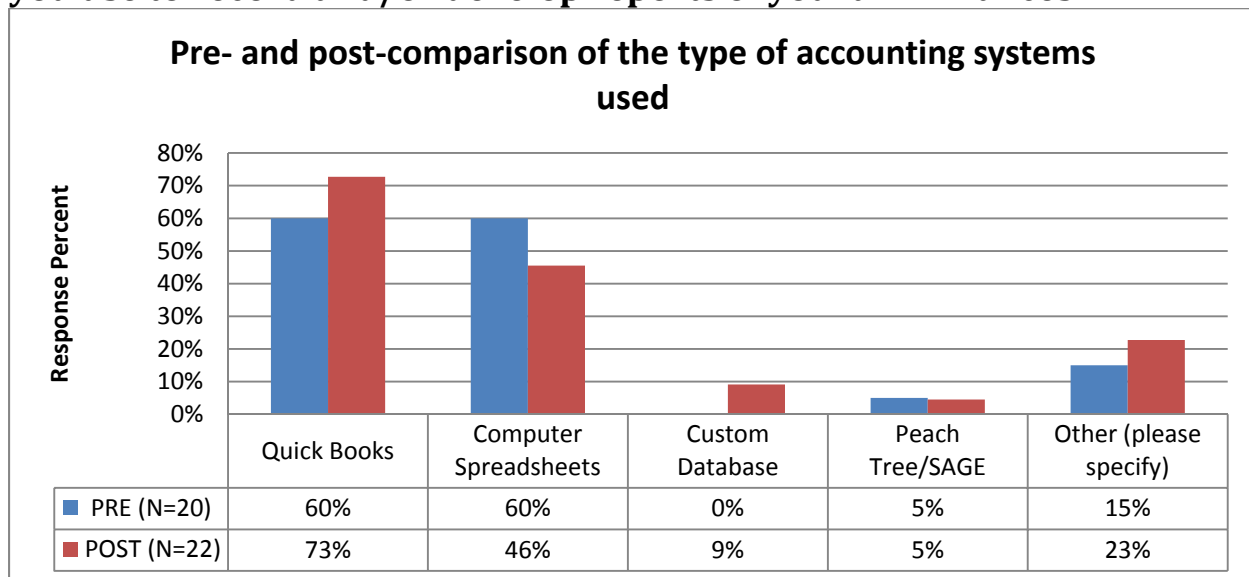
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Q22 POST Survey: If you answered “yes” to Question #21 how long would it take you to produce this statement?

(N=20)

1. immediate
2. Immediate
3. just need to print it out
4. 1 minute
5. 1 minute, printing from QuickBooks Online.
6. 2 minutes. I have everything entered into quick books
7. a couple of minutes via Quickbooks
8. a few minutes
9. minutes
10. 5 minutes
11. 5 minutes
12. 5 minutes
13. 5 min
14. 5 minutes (via quickbooks)
15. under 2 hours
16. a few hours?
17. A day
18. same as prior survey--1 day, with help from daughter Suzanne or CPA
19. 1 day
20. a few weeks

Q 24 PRE Survey/ Q23 POST Survey: What type of accounting system do you use to record and/or develop reports of you farm finances?



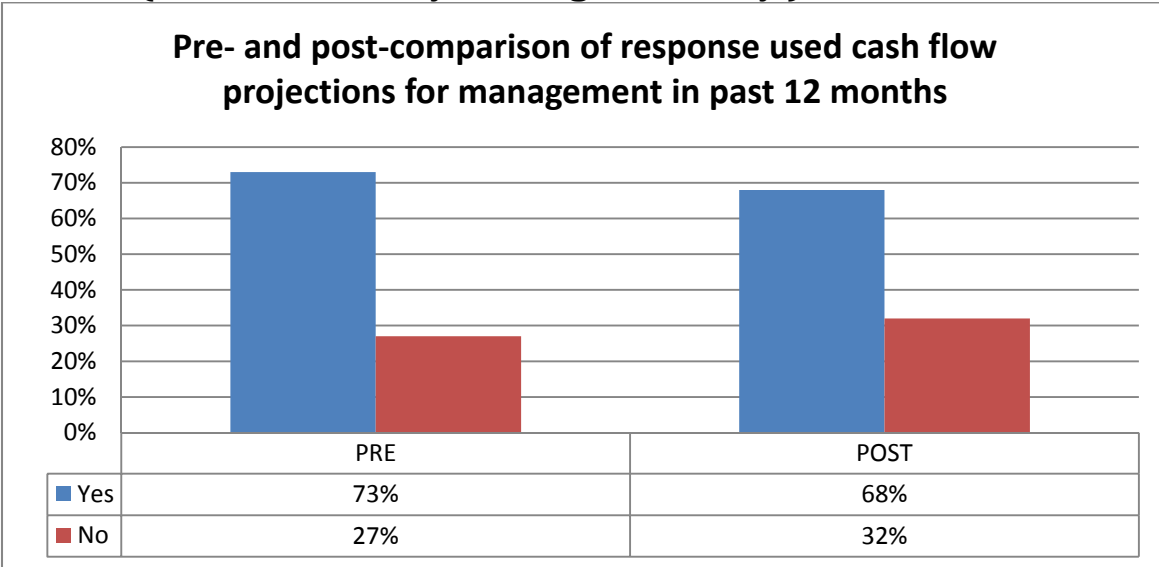
Q 23 PRE SURVEY Other (please specify)

1. paper and pencil
2. unclear. Probably Quick Books at the CPA's; maybe at his daughter's
3. Quick books online

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Q24 POST Survey: Other (please specify)
1. Pencil and paper-We have Quick Books in a box
2. WAVE APP (online budgeting software)
3. same as prior survey--1 day, with help from daughter Suzanne or CPA
4. InvoiceToGo tracks our sales

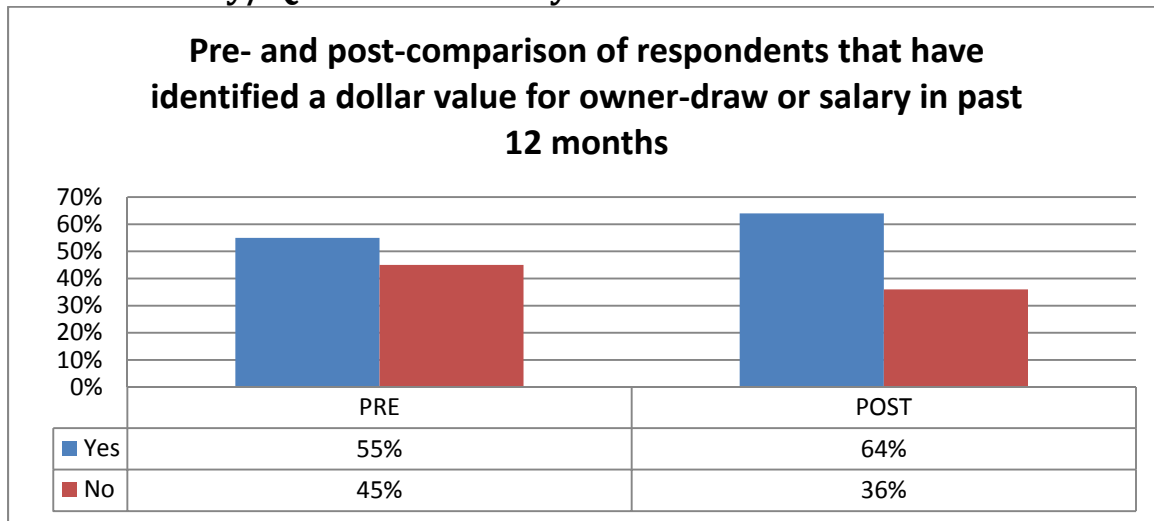
Q 25 PRE Survey/ Q24 POST Survey: In the past 12 months have you developed a cash flow projection to manage the cash needs of the business? (This was #25 in your original survey.)



Q24/25	Response Count PRE	Response Count POST
Yes	16	15
No	6	7

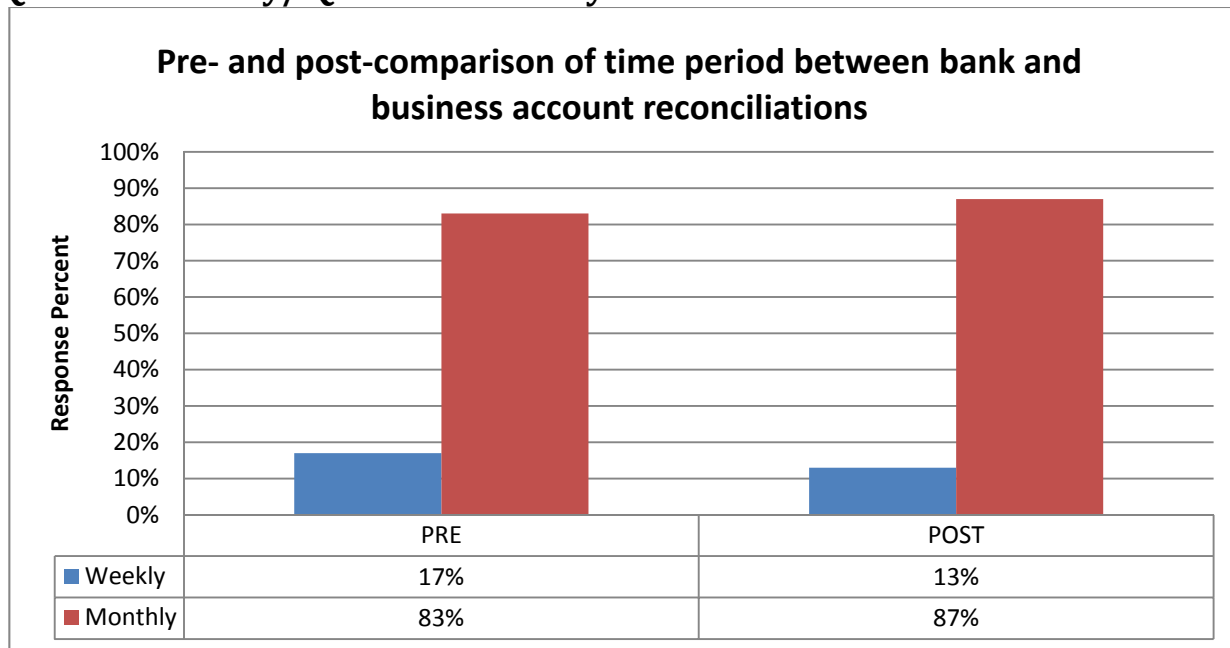
Attachment I: Compilation of Pre- and Post-Survey Data for NESARE 11-310 Measuring Profitability & Success, December 2015.

Q 26 PRE Survey/ Q25 POST Survey:



Q26/25	Response Count PRE	Response Count POST
Yes	12	14
No	10	8

Q 27 PRE Survey/ Q26 POST Survey:



	Weekly	Monthly	Other
PRE	2	10	11
POST	2	14	8

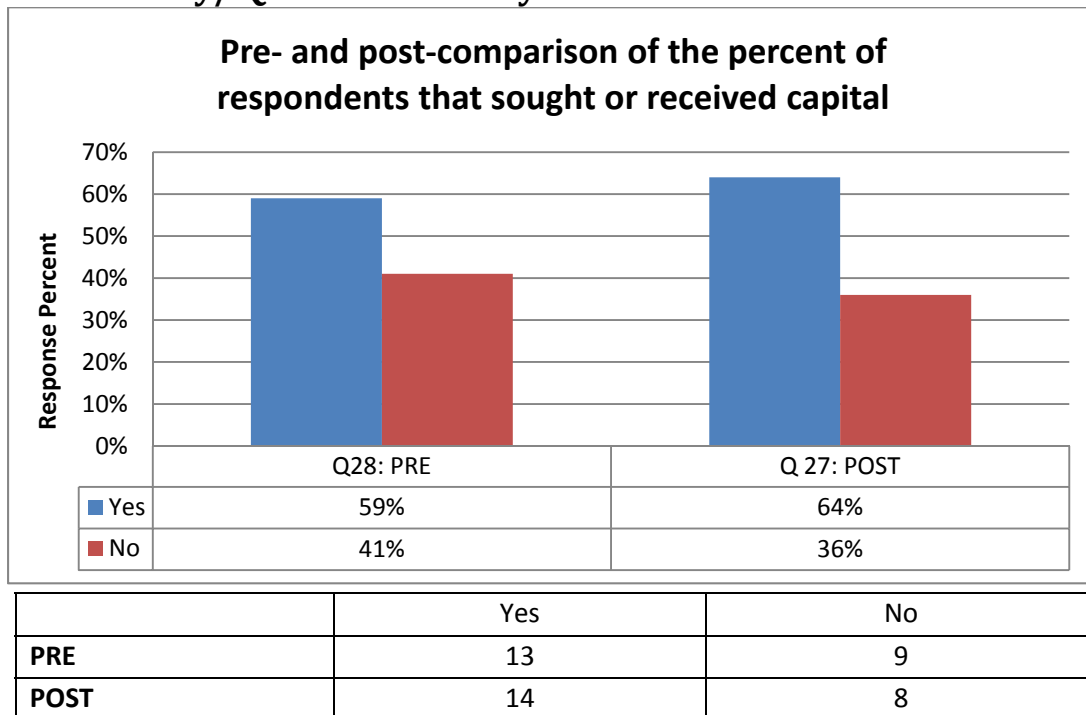
PRE: Other (please specify)

1. Monthly until about May, then less predictably after that.

Attachment I: Compilation of Pre- and Post-Survey Data for NESARE 11-310 Measuring Profitability & Success, December 2015.

2. 3 times a year
3. n/a
4. Quarterly
5. currently once a year
6. twice per month
7. annually
8. approx. bi-monthly
9. No doing well
10. sometimes in Oct for July, Aug, Sept
11. usually only once/year
POST: Other (please specify)
1. 2-3 times a year
2. n/a
3. when there is time
4. monthly, except peak season (July/Aug) less than monthly
5. Officially once a year with the CPA; Suzanne does it twice a month for expense accounts/bills.
6. We have a bookkeeper help us. Montly appointment with her keeps us on track. We were horrible at it before starting with her. Sometimes we miss a month, but usally monthly.
7. Not often enough
8. Every 2 weeks

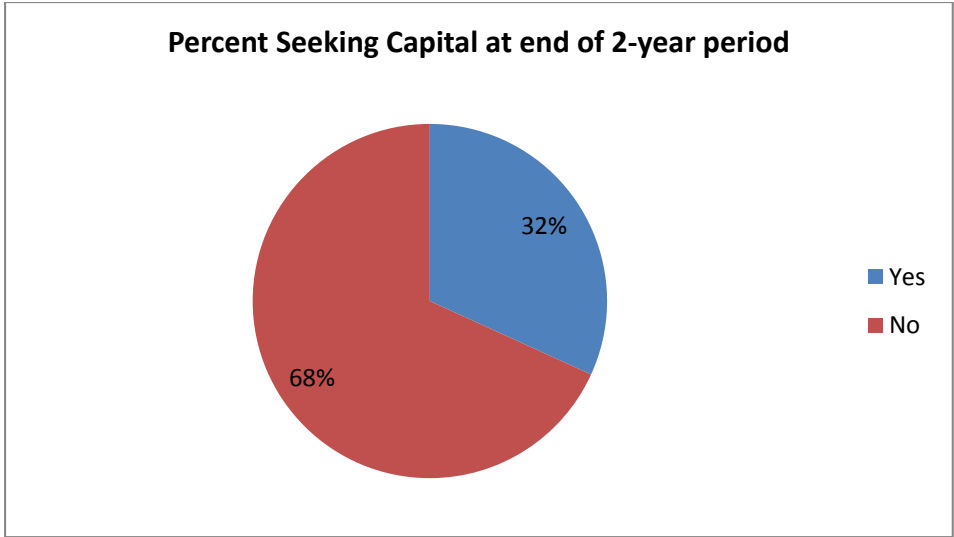
Q 28 PRE Survey/ Q27 POST Survey:



Q28 POST Survey: Are you currently seeking capital to develop your business?

(N=22)

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**Q 29 PRE Survey: Explain how access to these funds will enhance the
VIABILITY of the BUSINESS.**

<i>answered question</i>	12
<i>skipped question</i>	10
<p>1. We recently moved our farm business to a new location, to a 60-acre farm we purchased after a conservation easement was placed on most of the land. We are moving forward quickly implementing our business plan, trying to get all the things in place necessary to grow and sell our crops, and generate the cash flow we need to meet our new expenses.</p> <p>In order to produce and market our crops, we need some key infrastructure and equipment to be in place (a space in the barn for a retail farm stand, cold storage for vegetables, tillage equipment, irrigation equipment, etc.) The new farm is an excellent location for retail sales, and we see great potential for on-farm sales to grow, and enable us to explore options for expansion into other crops and products as we get ourselves established.</p> <p>Access to funds to get some basic infrastructure in place will mean that we will be able to meet our production and sales goals for our first year, and get systems in place to build on that success in future years.</p> <p>We are finding the "start-up" phase challenging because we need to invest some capital in the farm, but it is unclear where that financing is going to come from. We aren't able to fund it all ourselves, having just spent a big chunk of our savings on a down payment for the farm purchase.</p>	
<p>2. Funds help purchase cattle to assist in executing the VAPG \$293K grant we received from USDA.</p>	
<p>3. I have recently purchased land that has no farm infrastructure. Funds will give me the ability to build a processing barn to store equipment and seeds, process produce, package and store produce for delivery. Having a well organized and efficient space to process produce will help the farm operation run more smoothly, which will increase the quality of the products, which will increase customer satisfaction and increase sales, enhancing the viability of the business.</p> <p>Having an inefficient processing set up cost time, which means more time is spent washing and preparing produce than planting, harvest and marketing the produce. Getting enough produce to the markets is how the profits are made not by wasting time washing carrots.</p> <p>I can increase the viability of the business by getting the best looking produce out to markets as quickly as possible and making sure I have enough of the product to meet the demand.</p>	
<p>4. We are seeking loans and investors for start-up costs.</p>	
<p>5. By accessing more beef to meet current and growing demand at profitable margins I'll be able to further grow the business and intend to have a modest draw/income that will effect quality of life by reducing financial stress at home.</p>	
<p>6. We are seeking loans to complement a MEGA grant we are getting from MDAR. We plan to use the money to purchase a box truck and possibly other capital purchases like implements for our walking tractor. Recently we've need up to 5 vehicles to get to market 3 times a week. 3 of the vehicles were borrowed from family and friends. We spent hours every week (and a lot of gas) moving vehicles from place to place. We also needed 5 people to drive the vehicles to market. We're hoping to save a lot of time with the addition of a large truck, as well as to stop imposing on our friends and family.</p>	
<p>7. I am seeking a working capital loan to allow for more efficiency of purchasing supplies in the beginning of the season, as opposed to pushing purchases into the future as far as possible.</p>	
<p>8. i am seeking a loan to drill a well and bring power to my vegetable fields which are too far away from the house well and electric to use. they will dramatically increase the efficiency of irrigating, and doing the wash/pack of vegetables. currently I have to harvest vegetables in</p>	

**Attachment I: Compilation of Pre- and Post-Survey Data for
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small batches and bring the a quarter of a mile down to the house to wash and pack, and the only way to irrigate is to bring large tanks of water to the field and hand water.
9. We are specifically seeking a business credit card, to start building a credit history for our business.
10. Funds are desired to facilitate our expansion onto offsite leased acreage, providing infrastructure for transporting equipment, washing and storing produce as well as for season extension. This will enable us to reach production and sales goals, better equipping us to meet demand for our product.
11. Free up funds by refinancing farm to reinvest in farm upgrades.
12. improved veggie washing area will make postharvest operations more efficient; expanded cold storage will allow us to store more veggies, better dry storage will decrease waste of materials that currently risk getting ruined in our current leaky barn. The impacts of a new barn will be far-reaching.

**Q29 POST: Explain how access to these funds has or will enhance the
VIABILITY of the BUSINESS.**

<i>answered question</i>	15
<i>skipped question</i>	7
1. original answer is still correct	
2. Equipment for increased efficiency, additional high tunnel for increased production.	
3. These funds helped by a bed hiller which as helped crops grow better in wet years.	
4. We are currently building a new dairy parn and creamery, off the grid. We may need additional financing for a solar power system	
5. Since we have a credit history now, It's now easy to get a high balance credit card (if we want to), and would probably be easier to get a line of credit or a loan from a bank, although we haven't had to try yet.	
6. x	
7. It helped get over a hump with covering labor costs, and allowed me to put in some needed infrastructure	
8. made it more efficient; better quality; all necessary infrastructure for the business; made the business work.	
9. Previously we were paying by the hour for custom tractor work 3-4 times per year and supplementing with the use of a walk-behind tiller. This became unfeasible as our scale and number of succession-planted crops and cover crops increased, and we also needed equipment for winter high tunnel maintenance. Owning the equipment makes our production schedule much more flexible and efficient, and allows us to use our own labor for tractor work and build equity in the equipment as we pay off our loan.	
10. The addition of a box truck and tractor implements made a huge difference. Our weekly trips to markets were simplified because we could move everything easily and quickly. We also didn't have to unpack and clean the work truck before each market day. Tractor implements put us in control of our field prep and planting - in the past we were reliant on other farmers who would do tractor work for us whenever they had the time.	
11. The improvements we've made have enabled us to more efficiently incorporate off site acreage into our production and have storage for the increased production. More improvements and expansion of wash station and equipment is needed.	
12. To help us achieve our goals to increase vegetable production, and improving our profitability, we are working on finding more efficient methods, tools, and systems for accomplishing our work. The loan to purchase a tractor was a big step toward equipping ourselves with the appropriate tools for our current scale of farming.	
13. I refuse to seek loans. They are a burden to the business.	
14. Line of credit funds will help to relieve the stress of starting the farm in the spring, before we have cash flow but while we are doing a lot of supply purchasing and paying employees.	

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15. I looking for funds to increase the number of greenhouses the farm has. This will extend my season but also allow me to bring a more consistent product to market. Having limited land I feel this is the best way to enhance the viability of the business.

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**Q30 PRE: Explain how access to these funds has or will enhance the
WELL BEING and QUALITY OF LIFE for employees and/or owners.**

<i>answered question</i>	12
<i>skipped question</i>	10
1. I have rented land at 3 different locations and at each of them, it was difficult to make investments in infrastructure and equipment due to a variety of factors. Finally, we have long-term land tenure and the option to set things up right! It will be incredibly satisfying to finally be able to create systems and find solutions that will work for us and our crew in the long term. I look forward to having cold storage to keep harvested vegetables cool, a reliable irrigation system, tillage equipment to help us manage additional acreage, a retail space to sell our vegetables, etc. The farm will quickly become more productive, efficient, and profitable if we are able to make some modest investments in the farm in our first couple of years.	
2. We will have adequate cattle to supply product to our customers. Without cattle we have no product. No product to sell means employees won't get paid and owners will be unhappy.	
3. These funds will help build the processing barn. Having a well organized space improves time management, and having more time will enhance my well being. If the owner is more relaxed and happy then the employees will feel better about their job. I will be able to spend more time with my family and pursue other interests, which will improve my well being.	
4. It will help us start farming and get things running.	
5. By accessing more beef to meet current and growing demand at profitable margins I'll be able to further grow the business and intend to have a modest draw/income that will effect quality of life by reducing financial stress at home.	
6. The owners worked at least 80 hours a week in 2012. The hired staff was also overworked. We calculated that we would save between 20 and 30 hours of labor each week if we had one vehicle capable of carrying everything to market.	
7. Less stress on the owner, better efficiency and use of time do large purchases all at once. Access to the proper supplies and tools as soon as they are needed.	
8. The funds will really create more time for both employees and owner by removing a huge burden of transporting water and vegetables back and forth from field to current wash/pack set up. it will also conserve energy for other tasks on the farm.	
9. Building a credit history gives us more options in the future. One benefit of these options would be further separating our personal finances from the farm, which means easier bookkeeping, and also creates a business entity that is more autonomous, that we don't have to worry about.	
10. As we come closer to our desired owner draw, we hope to see less stress over our ability to meet demand for our product and our ability to support ourselves. We are working to cultivate a year round position for an employee of the past couple years, allowing him to pursue his desired participation in our farm and giving us the peace of mind related to having reliable help.	
11. reduce stress on family and decrease off farm income needed.	
12. decrease use of farm house as storage area, projects will be easier to accomplish with dry, indoor space to work on them. The impacts of a new barn will be far-reaching.	

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**Q30 POST: Explain how access to these funds has or will enhance the
WELL BEING and QUALITY OF LIFE for employees and/or owners.**

<i>answered question</i>	15
<i>skipped question</i>	7
1. original answer is still correct	
2. Some time off from working the farm during the season, less burn out.	
3. No improvement in quality of life.	
4. The solar power system will provide lights and cooling to the creamery, dairy and storage cooler	
5. We have more options for financing unexpected purchases or repairs, which reduces stress.	
6. x	
7. Reduces the stress associated with not having proper tools	
8. made work a lot easier. got to have the tools to do the work. And money is a tool, can't run a business without money.	
9. The tractor decreases the physical strain on farmers and staff who no longer have to use a walk-behind tiller for jobs it's really not scaled to do. It allows us to use our time more efficiently and thus leaves us more time for rest.	
10. We were able to reduce our workload a little. We felt like we were wasting less time. Overall increase in job satisfaction.	
11. safer, more appropriate tools make for less stress and better quality of life. Higher income helps achieve goals on farm	
12. The tractor purchase has already had a huge impact. For the first time, we have a loader for turning and moving compost, removing rocks from our fields, and carrying all kinds of things around the farm. Having a second tractor means 2 people can be using tractors at the same time. Mowing and discing (or rototilling) can happen simultaneously. This is major for us, as tractor work/bed preparation has historically been the bottleneck that causes us to fall behind in our planting schedules. We have always tried to manage more acreage than we were equipped for. We are finally accumulating the tools appropriate to our 6 acres of vegetables (and 60 acre property to manage). This helps both employees and the owners more prepared to our jobs!	
13. They won't help.	
14. Employees will have more regular hours earlier in the season than in past years. I will be less stressed about checks bouncing, will sleep better, and will be a nicer person to be around.	
15. Having access to these funds will allow me to grow the business quicker, reaching my personal quality of life goals faster. As I'm the owner and essentially the sole employee, getting more product with less labor will enhance my quality of life. And not being as bound to weather as I currently am will remove significant stress and anxiety about the upcoming seasons production capabilities.	

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Q 31 PRE: Are you confident that the business will be able to pay back any money that it intends to borrow?

Answer Options	Response Percent	Response Count
Yes	92.3%	12
No	0.0%	0
Not Sure	7.7%	1
<i>answered question</i>		13
<i>skipped question</i>		9

Question 31 is the end of the PRE Survey.

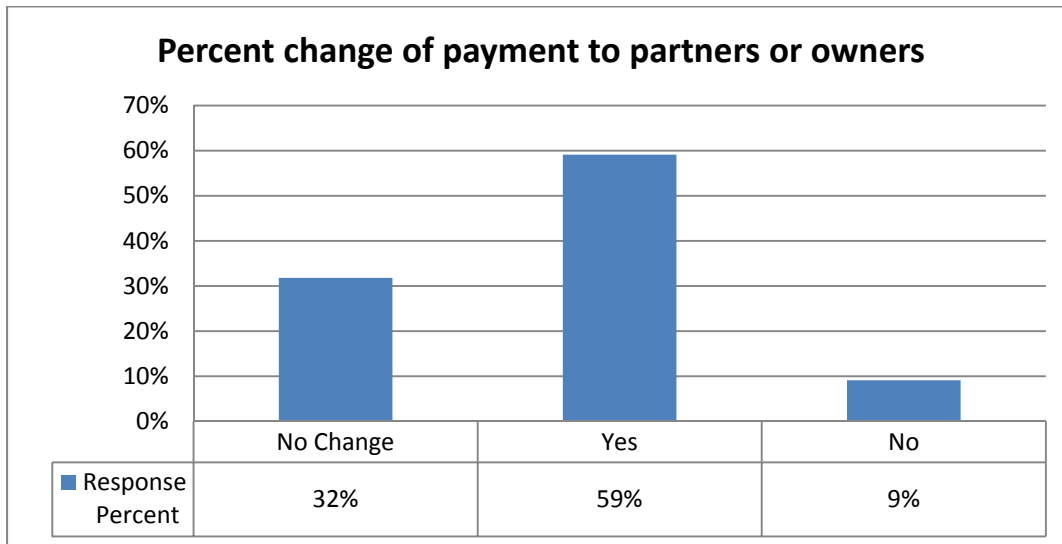
Q 31 POST: Are you confident that the business will be able to pay back any money that it intends to borrow?

Are you confident that the business will be able to pay back any money that it intends to borrow?		
Answer Options	Response Percent	Response Count
Yes	100.0%	15
No	0.0%	0
Not Sure	0.0%	0
<i>answered question</i>		15
<i>skipped question</i>		7

**Attachment I: Compilation of Pre- and Post-Survey Data for
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**Q32: Has the amount you pay yourself and other partners or owners
changed?**

(N=22)



**Q33: If the amount you have paid yourself has changed provide before
and after amounts.**

(N=16)

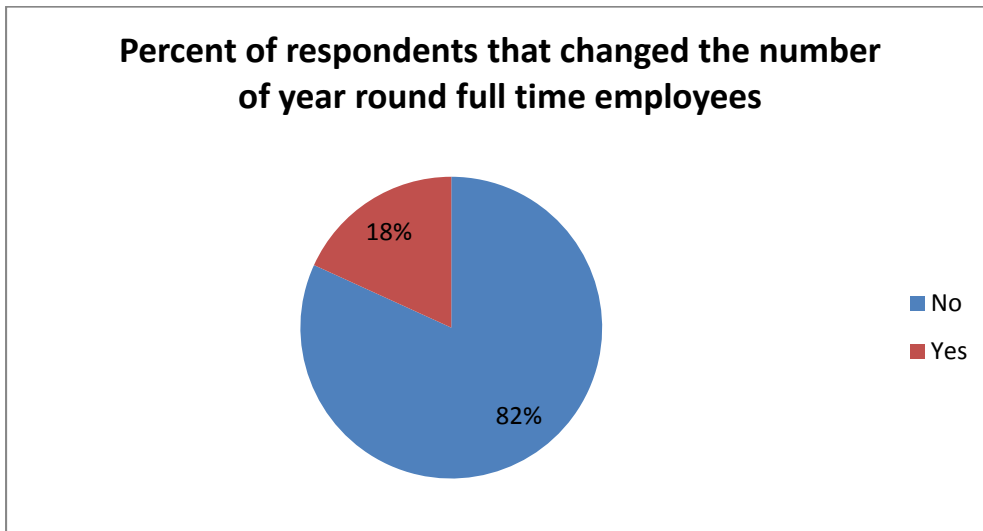
<i>answered question</i>	16
<i>skipped question</i>	6

Change in payment to partners or owners

	Before	After	Trend	Change	% Change
1	\$ 12,500	\$ 12,800	↗	\$ 300	2%
2	\$ 7,500	\$ 16,000	↗	\$ 8,500	113%
3	\$ -	\$ 20,000	↗	\$ 20,000	
4	\$ 10,000	\$ 38,000	↗	\$ 28,000	280%
5	\$ -	\$ 25,000	↗	\$ 25,000	
6	\$ 30,000	\$ 48,000	↗	\$ 18,000	60%
7	\$ -	\$ 25,000	↗	\$ 25,000	
8	\$ -	\$ -	↔		
9	\$ -	\$ -	↔		
10	\$ -	\$ -	↔		
11	\$ -	\$ 24,000	↗	\$ 24,000	
12	\$ 38,000	\$ 53,000	↗	\$ 15,000	39%
13	\$ 20,000	\$ 35,000	↗	\$ 15,000	75%
14	\$ 18,000	\$ 20,000	↗	\$ 2,000	11%
15	\$ -	\$ 1,200	↗	\$ 1,200	
16	\$ 6,000	\$ 15,000	↗	\$ 9,000	150%
TOTAL	\$ 142,000	\$ 333,000	↗	\$ 191,000	135%
AVERAGES	\$ 8,875	\$ 20,813		\$ 14,692	91%

**Attachment I: Compilation of Pre- and Post-Survey Data for
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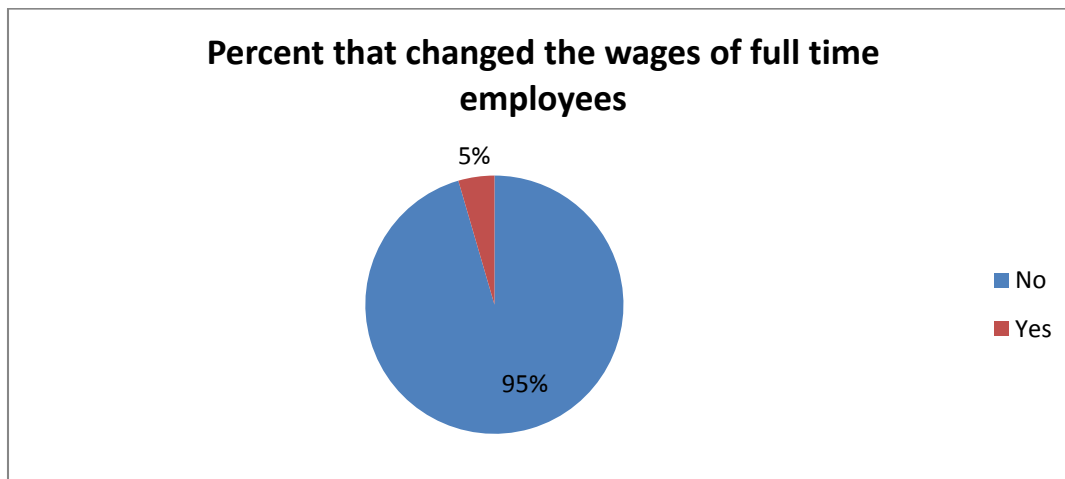
Q34 POST: Has the number of year round full time employees changed?
(N=22)



If yes, by how much has the number of year round full time employees changed?

1. +1
2. part time people gone; milking crew gone. Daughter taken over bookkeeping, paid lump sum yearly--when farm becomes corporation this will be formalize.
3. We had 1 year round employee this year, but he was part time in January, February and March. First time we've employed anyone year round though.
4. +1
5. I've actually gotten smaller, eliminating my farm partner.

Q35 POST: Has the wage of year round full time employees changed?
(N=22)



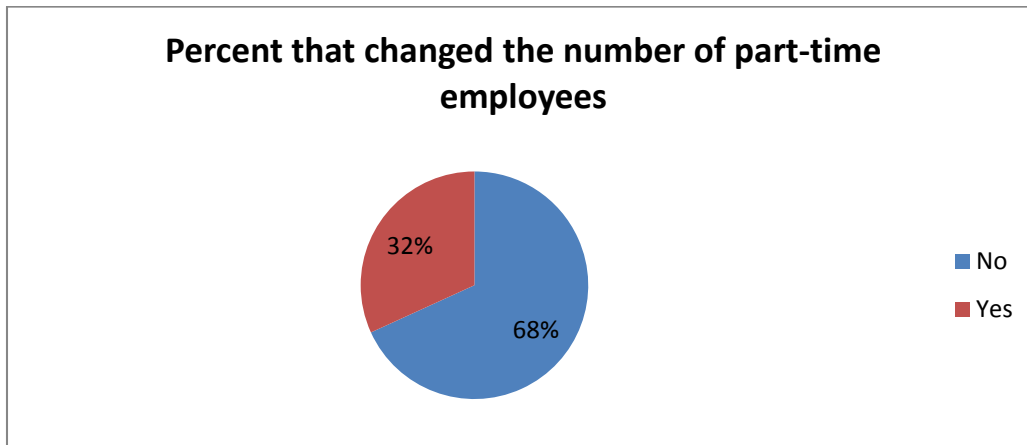
If yes, by how much has the wage of year round full-time employees changed?

+3.00/hr

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Q36: Has the number of year round part-time employees changed?

(N=22)

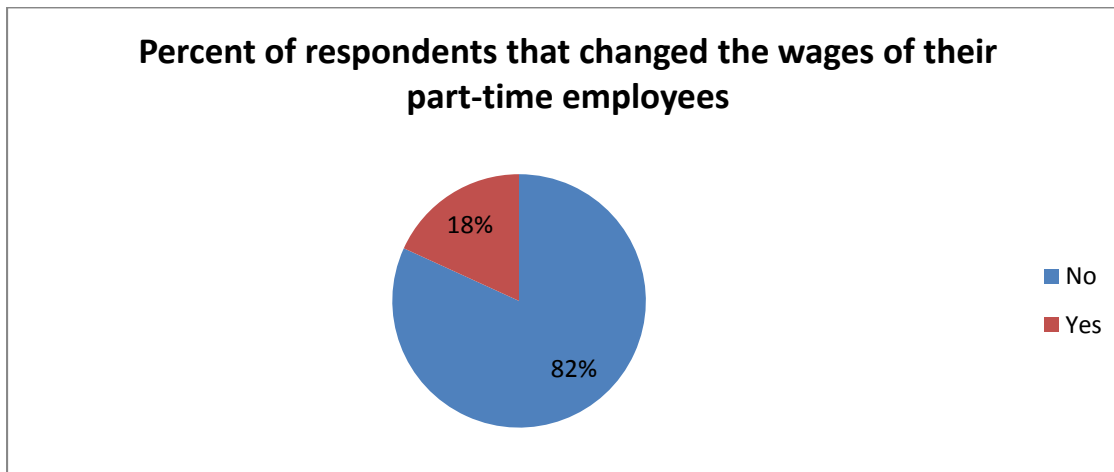


If yes, by how much has the number of year round full time employees changed?

- | |
|----------------------------------------------------------------------------------|
| 1. 2 part time employees have gone |
| 2. We employed 1 person part time in the winter, full time the rest of the year. |
| 3. from 0 to 1 |
| 4. We have fewer of them |
| 5. I am now at 2.5FTE |
| 6. add 1 |

Q37 POST: Has the wage of year round part-time employees changed?

(N=22)



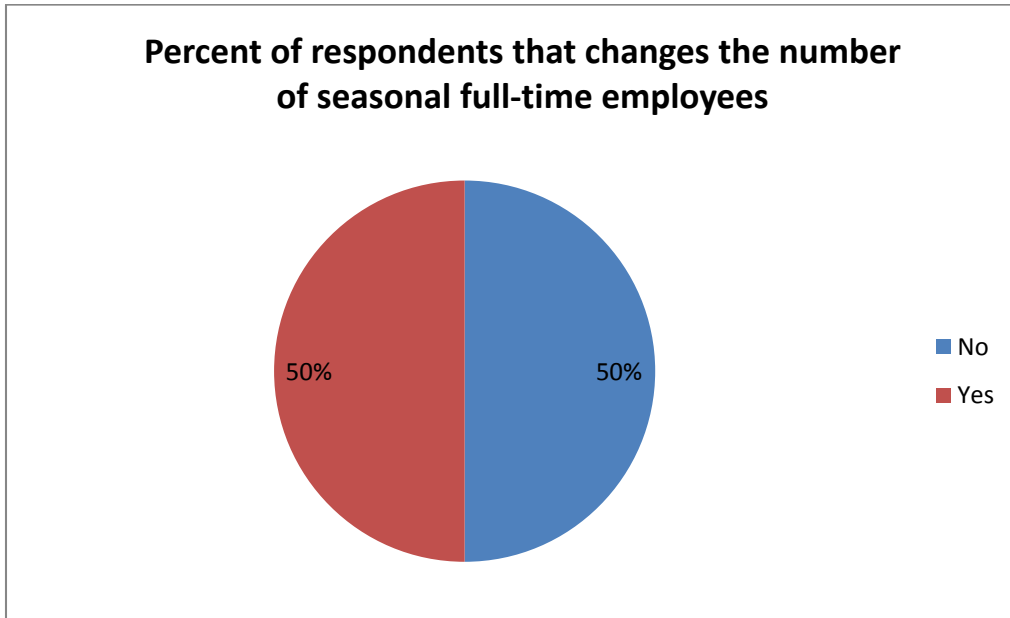
If yes, by how much has the wage of year round part-time employees changed?

- | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. all employees still paid hourly |
| 2. 9 to 10 hourly, from 500 to 800 stipend employees |
| 3. Base salary is now \$10.10. Returning employees get a 5% raise every year. I have 1 employee returning for her 4th year, and 1 employee returning for her 2nd year. |
| 4. increase hourly wage to \$13.00 |

**Attachment I: Compilation of Pre- and Post-Survey Data for
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Q38 POST: Has the number of seasonal full-time employees changed?

(N=22)

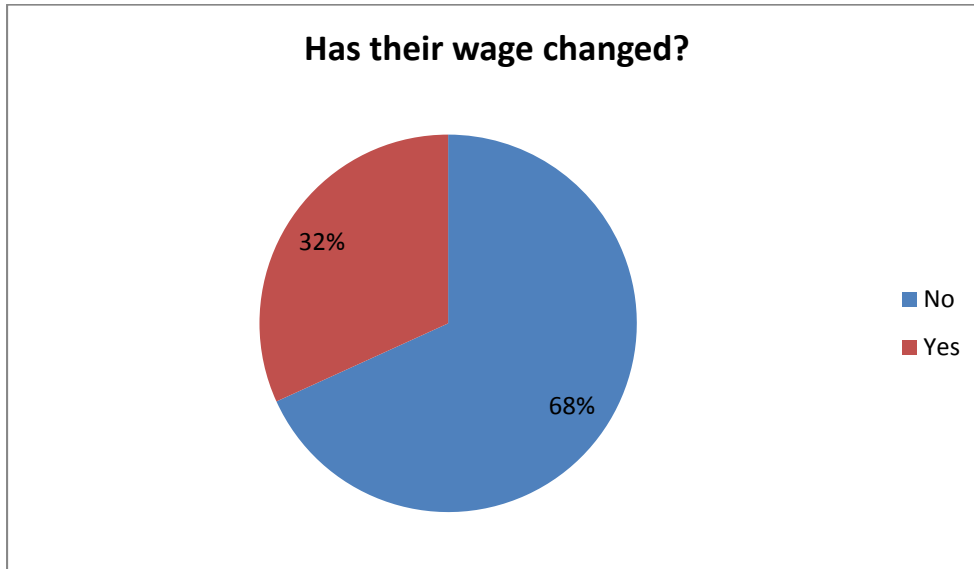


If yes By how much?
1. 0 in 2011, 2 in 2014
2. 2
3. 2
4. from 2 in 2011 to 5 in 2013
5. 2
6. no option for seasonal part-time? for 2015 season I hired an employee for 5.5 months for 24 hrs/wk
7. 2 more
8. All our employees are seasonal part time... but that wasn't asked, so I'm putting it here. Up from 1 in 2011 to 5 in 2015
9. 2
10. now at 2.5 FTE
11. add 1

**Attachment I: Compilation of Pre- and Post-Survey Data for
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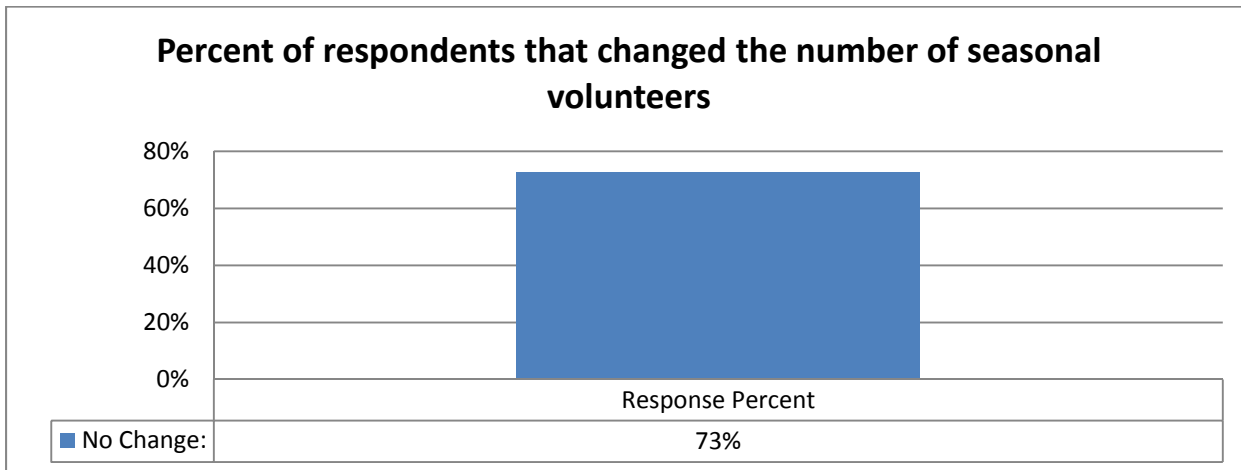
Q39 POST: Has their wage changed?

(N=22)



If yes By how much?
1. increases by 150%
2. +\$2 and +\$1 /hr
3. from 7700 in 2011 to 17, 000 in 2013
4. paid hourly
5. increased by 1 to 1.50/hour
6. from \$8 up to 10-12/hr
7. See #37
8. increase hourly wage by \$2.00

**Attachment I: Compilation of Pre- and Post-Survey Data for
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Q40 POST: Has the number of seasonal volunteers changed?
(N=22)**



No Change:	Before:	After:
1. NO CHANGE		
2. no change, but you didn't ask about seasonal part time workers: have increased from 0 to 2-3		
3. NO CHANGE	0	0
4. NO CHANGE		
5. NO CHANGE		
6.	0	1 volunteer
7. No Change		
8.	1	4
9. NO CHANGE		
10. no volunteers on the farm		
11. no change - 2015 season we have 6 weeks of volunteer help (in exchange for room and board)		
12. None		
13. No change.		
14.	0	3
15. no volunteers		
16.	3	4
17. none		
18.		4
19. Well, it is illegal for farms to use volunteers. But we do have more "unpaid" farm workers who help out.		
20. NO CHANGE		
21. NO CHANGE		
22.	0	5 or 6

**Attachment I: Compilation of Pre- and Post-Survey Data for
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Q41 POST: Did your Project Coordinator provide the services you expected? If not, what did you expect that you didn't receive?

Did your Project Coordinator provide the services you expected? If not, what did you expect that you didn't receive? (Response will be used in aggregate with other farms to ensure confidentiality)
Open-Ended Response
1. I didn't know I had a project coordinator. The only thing I recall hearing about the project were requests for financial information. What services should I have expected?
2. Honestly I don't know, received services from a number of different providers and they've run together as to what was from what project.
3. Yes
4. Yes, mostly book keeping help The contractor was difficult to schedule time with due to her erratic schedule and our farm schedule and we still have some things to work on
5. Yes
6. yes
7. no. we rec'd no services. I expected bus mgmt and financial assistance.
8. Yes, Mark was extremely helpful and committed to helping make my farm a success
9. Yes. And CEI has done well by the farm.
10. yes
11. Yes, thanks
12. Yes, she was very helpful in providing guidance throughout the project
13. We received great services from our Project Coordinator.
14. Yes, excellent help in getting our numbers into a standard format and some help in interpreting the numbers. I was hoping for more help with strategy - taking the numbers and then exploring some ways to improve.
15. yes!
16. we didn't connect as much as expected but that was more due to the farmers' schedule demands.
17. Yes, and even exceeded expectations in some areas, like customized worksheets for budgeting.
18. Most of the help I received focused on making better use of Quickbooks. This was very helpful. In addition to financial recordkeeping help, I was also hoping for more coaching/guidance/resources on financial planning and business decision making (such as budgeting, enterprise analysis, prioritizing and financing capital purchases, etc). I did find this type of help through a business coach from NHSBDC (outside of the SARE project).
19. No. I expected someone who would understand what it takes to run a farm.
20. Yes, the project coordinator provided all services expected, and then some.
21. yes
22. I actually wasn't quite sure what I would receive, but was happy with what I did receive.

**Attachment I: Compilation of Pre- and Post-Survey Data for
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Q42 POST: The services provided through Measuring Profitability and Success were specific due to its nature as a research project. Are there other services that would have been helpful to include that you did not receive? If yes, please explain.

Response Text
1. Quickbooks support and setup
2. n/a, see above
3. No
4. no
5. more training on quickbooks
6. No
7. no
8. any farm specific assistance from a financial prof is welcome.
9. Not sure
10. No. Everything I needed was taken care of. No complaints at all with CEI.
11. no
12. I think marketing, branding and market expansion are three areas we could always benefit from learning more about.
13. Maybe a business viability analysis upfront would have been a good reality check from the get-go.
14. See above - just more individualized coaching and strategizing.
15. this was great - thanks
16. not sure
17. It is often difficult to know where you stand relative to other farms. I think that the point of the project was to start to know and analyze numbers and look for trends and share them. That info will be extremely helpful. I'd also love to see the books and budgets for a range of well-established farms. If they're doing well, what does that look like? Sometimes it feels like there are no benchmarks.
18. Help updating our business plan!
19. It would have been nice to have an adviser who understood farming and was willing to roll up his/her sleeves and help get our books in order. Everything my adviser suggested cost me money and when I could not do what she asked she did not help in any way other than reminding me that she told me to fix my books. MUCH more helpful would have been if she could have worked with my accountant to get the books in the condition she wanted. It turned out that most of our meetings were, in hindsight, a waste of time for me and my team. I had to rely on my accountant and business manager donating time to this project that would have been better spent doing other things.
20. No, Mark was willing to work with me where I was.
21. not sure
22. No, I was satisfied with the services.

**Attachment I: Compilation of Pre- and Post-Survey Data for
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Q43 POST: If available, would it be helpful to you to continue to receive the type of advice and feedback you've received as a participant in this project?

(N=22)

