

# Statement of Professional Contributions and Scholarship

## Dunn County: Situation and Background

Located in western Wisconsin, Dunn County is home to a diverse agricultural industry, contributing 3,890 jobs and \$806 million dollars in economic activity (Deller, UW-Extension, 2012). 1,404 farm businesses engage in dairy, beef, turkey, meat goat, cash grain, horticulture, and vegetable crop production on over 372,000 acres of the county's land (USDA Census of Agriculture, 2012). In 2014, 104,500 acres were planted in corn, 52,900 acres in soybeans, 7,400 acres in oats, and 30,600 acres were harvested for alfalfa hay (USDA NASS Survey, 2014). Dunn County leads Wisconsin in the production of dry edible beans, and is sixth in grain production with \$110.5 million in sales. Dairy farming continues to be a major agricultural industry in Dunn County with \$83.9 million in sales.

In 2009, community members and the Dunn County Board of Supervisors Community Resource and Tourism Committee (CRTC) requested the Agriculture Agent position description be expanded to include agriculture economic development, entrepreneurship & business planning, and developing networks and collaborations to promote agriculture economic development.

Dunn County Agriculture educational program planning has occurred through multiple methods. In 2010, I conducted a formal agriculture educational needs assessment in Dunn County. Surveys were distributed to Dunn County community members, via email, mail, and during meetings with farm groups, associations, and committees. Survey respondents (n=153) indicated the top agriculture educational needs in Dunn County were (Ranked: 1=most important to 8=least important): 1) Farm financial/business management (3.51), 2) Grains (3.59), and 3) Land use and environmental issues (3.67) ([Exhibit 1](#)).

A focus group was conducted in 2011 to assess the educational need for agriculture economic development education in Dunn County. Participants of this focus group identified the following priorities: 1) Communication to consumers about agriculture, 2) Utilize existing resources to create more opportunities for economic growth in Dunn County, and 3) Assistance for producers looking to create value added products ([Exhibit 2](#)).

Information gathered from the needs assessment, focus group, and updated position description was used to establish the following major areas of focus: 1) Agriculture Economic Development and 2) Farm and Financial/Risk Management.

## Agriculture Economic Development

### Business Planning/Development and Entrepreneurship

Value-added agriculture and local foods were identified as educational needs during the focus group discussion. The Dunn County UW-Extension office staff collaborated with Dunn County agencies and businesses to host the Dunn County Local Food Summit in 2011. This event connected people with a shared interest in local foods, initiated conversations about local food networks, and identified steps to support future actions. During my conversations at this event and the annual Wisconsin Local Food Network (WLFN) summit, producers expressed their concerns regarding the lack of resources and information available for agriculture entrepreneurial development. To meet these needs, I collaborated with two UW-Extension educators and three agriculture professionals on a \$2,250 WLFN mini-grant to develop and deliver a series of one-day business planning workshops titled, Seeds for Success: Planning and Financing Your Local Food Business ([Exhibit 3](#)).

Twelve agriculture entrepreneurs attended the Seeds for Success workshop hosted in Dunn County to learn more about developing and adopting a business plan. I facilitated a panel of speakers during this session who presented financing and grant opportunities for value-added agriculture businesses. Agriculture entrepreneurs and professionals attended one of three workshops across Wisconsin. Sixty-four percent of respondents to a follow up online evaluation (n=11) indicated they had started to work on their business plan; and fifty-five percent indicated they had sought out financial options for their business ([Exhibit 4](#)). One participant noted, "It was very helpful for me to get focused on what I wanted to do." In 2012, I was invited to present on the Seeds for Success workshops at the Women in Agriculture Educators National Conference in Memphis, TN ([Exhibit 5](#)) and to my peers during the UW-Extension Agriculture and Natural Resources Extension (ANRE) All-Colleague Conference.

Women entrepreneurs who produce specialty and value-added agriculture products are a rapidly growing segment across the country and particularly in western Wisconsin. Women as principal operators are significantly different from the general farm population: a higher percentage are beginning farmers and on average manage fewer acres. To expand access and provide greater opportunity to this growing population, Annie's Project for Beginning and Value-Added Women Farmers program was held over six weeks during 2013 ([Exhibit 6](#)). UW-Extension Agriculture Agents Ryan Sterry, Jennifer Blazek and I collaborated with Joy Kirkpatrick, Outreach Specialist at the UW Center for Dairy Profitability (CDP), on a \$5,700 grant. The grant funded an update to the original Annie's Project program and adapted the series for western Wisconsin.

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### **Agriculture Economic Development/ Business Planning/Development and Entrepreneurship (continued)**

Annie's Project is a successful program that focuses on risk management strategies and tools for women farmers by providing useful, research-based information and resources. I led and coordinated a number of components of the six-week program, including seeking sponsorships, scheduling guest speakers and local agriculture entrepreneurs, and working with a local business to host the program.

Agriculture Agents partnered with Family Living, 4-H Youth Development, Community, Natural Resource and Economic Development Agents, UW-Extension State Specialists, and local agriculture professionals to provide information and resources to 21 attendees. The six-part workshop series met with participants for a total of 24 hours of instructional time. I taught sessions on business feasibility, business planning, market development, and a session titled "Working with your Lender," which provided information and resources on financing an agriculture business ([Exhibit 7](#)). The end of session evaluations indicated all participants who attended this session (n=15) felt I provided them with the information they needed when seeking financing with a lender. One participant stated, "This helps me understand what my lender will expect from me" ([Exhibit 8](#)).

The six-part program was evaluated in five separate methods: a baseline evaluation was collected to determine participant goals for attending the program and demographic information; a mid-series and an end of session evaluation measured the knowledge and skills gained during the sessions; a six-month follow up evaluation and one-on-one interviews conducted one year following the series measured any actions taken or decisions made as a result of their participation in the series. Results from the evaluations were summarized into a report to communicate the success of this adapted Annie's Project program. When asked if respondents had used any of the information which had been presented, the top three topics identified were market research, business planning, rules and regulations. These topics addressed the concerns expressed in the baseline survey and were also the highest rated, in terms of quality and usefulness, during the program. All of the participants reported they will use the information presented in this program when starting, reviewing or expanding their business. Eighty-five percent of participants indicated they have started, had a portion done or have completed their plans. One respondent reported, "Changed my business plan to include some things that I had not thought of until the project workshop" ([Exhibit 9](#)).

Women participants shared the information they learned from Annie's Project with a total of 51 beginning and women farmers. Networking has continued even after completion of the course: half of the participants continued to network with at least one other participant. Most kept in contact through email, while 57 percent met in-person with another participant, on their own or through the Annie's Project reunion which has been organized each fall. One participant noted, "4-5 people from class continue to network for farm and business advice" ([Exhibit 9](#)).

Participants highly valued the educational and networking opportunities offered through the Annie's Project program. When asked to place a dollar value on the program, the average value reported was \$310, as compared to the actual cost of \$40 per person for the six-part program. Comments from program participants during and after the program praised the high quality of the program and Agent involvement ([Exhibit 9](#)).

- "Extremely valuable!!! I feel like I have enough info and resources to get started. Thank you for investing in me."
- "This project definitely has a place in today's rural areas and if at all possible, should be offered again in WI. I learned more in this project than a full college course would have provided."
- "I really enjoyed the course. We are planning to start our farm this year. This was great information to help us in this process. I appreciate the opportunity to meet other women producers & learn from the lunch guest speaker. The content was really good. Some women-in-Ag programs are "fluffy" in nature. This wasn't. Thank you!"

Program participants have continued to excel with their businesses after the conclusion of the program. One Dunn County Annie's Project participant recently completed classes and an internship to receive her Wisconsin Cheesemakers license. She operates a dairy goat farm and I have been assisting her with a business plan, grant applications, and financing to own and operate a small-scale creamery. Another participant credits Annie's Project with her decision to resign from full-time employment to pursue her niche agriculture business ventures in raising meat goats and pasture-raised turkeys.

As a result of my work, the Annie's Project program series materials, evaluation results, and impacts were selected for presentation and poster display at several state and national conferences, including: Joint Council of Extension Professionals (JCEP) – Wisconsin Conference, Extension Risk Management Education National Conference, JCEP Galaxy IV National Conference, and ANRE All-Colleague Conference. Furthermore, our scholarly work in agriculture entrepreneurship and unique programming for farm women was selected for publication in the peer-reviewed *Journal of the National Association of County Agricultural Agents* (NACAA) ([Exhibit 10](#)).

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### **Agriculture Economic Development/ Business Planning/Development and Entrepreneurship (continued)**

Business planning/development and agriculture entrepreneurship educational programming are valuable to UW-Extension and the agriculture industry. Entrepreneurship continues to grow in all sectors of business; however few educators provide this type of education. The continued interest being expressed by UW-Extension educators, colleagues across the country, and women in western Wisconsin demonstrates the need for these types of programs targeted at beginning farmers and those women interested in value-added agriculture. I find my efforts when working one-on-one with agriculture entrepreneurs to be both professionally and personally fulfilling and look forward to continuing this educational programming in the future.

#### **Agriculture Literacy**

The non-farm population of Dunn County continues to increase, while farmers only represent three percent of the total population in Dunn County (USDA Census of Agriculture, 2012). The focus group on agriculture economic development indicated that this position further develop communication to consumers regarding agriculture; and the group placed an emphasis on developing networks and collaborations to promote agriculture economic development ([Exhibit 2](#)).

Since 2010 I have taken an active role in educating 5,000 local community members on modern agricultural practices as part of the annual Chippewa Valley Farm-City Day (CVFCD). CVFCD is an educational event which invites the public to a working farm. I have chaired the CVFCD planning committee for the past three years and annually coordinate this event with UW-Extension Agriculture Agents and professionals from Chippewa, Dunn, and Eau Claire counties. CVFCD is a not-for-profit event that is supported by local donations and in-kind sponsorships, of which I have successfully assisted in raising over \$20,000 for the past six years.

I led efforts in 2014 to expand CVFCD from a one-day event to two days, during which included on-farm agriculture education for elementary school students. Schools from Chippewa, Dunn and Eau Claire counties participated. Post-event evaluation of the teachers last year (n=3) indicated CVFCD was able to change quite a bit of their students perception of modern agriculture practices. One teacher commented, *“It was an eye opening experience for our kids. They talked about the experience for days. Thank you for including us in this event”* ([Exhibit 11](#)). A collaborative evaluation of the effectiveness of the CVFCD event found over 70 percent of respondents (n=68) increased their understanding of milk production, machinery/equipment, animal care, and land conservation ([Exhibit 12](#)).

During 2014 the Dunn County Board of Supervisors CRTC participated in a facilitated discussion to re-establish the definition for agriculture economic development and identify priorities for Dunn County. Agriculture economic development was defined as (based on input/consensus from committee members): “Build profitable and suitable agricultural opportunities and practices using available natural, financial, and educational resources.” Based on this definition, the priorities were identified as: 1) Conservation of natural resources, 2) Non-commodity markets, and 3) Marketing.

Farmers and community members have expressed concerns regarding soil erosion, improving conservation practices, and better water management in Dunn County. After discussions with agency staff, the Dunn County Soil and Water Health Partnership was formed to better promote soil health and water quality through education and on-farm demonstrations. I took the lead role in pursuing the rental of 150 acres of county and city-owned farmland for this purpose. We were approved for a five-year lease agreement on this property and have outlined short, medium, and long-term goals for this project ([Exhibit 13](#)).

I have been coordinating with UWEX State Specialists to establish field demonstrations and design on-farm research projects to be conducted on these farm fields. This new opportunity has allowed me to build relationships among county stakeholders and agriculture professionals whom I may not have had the opportunity to work with in the past five years. I’m looking forward to improving soil health, providing on-farm demonstrations, and conducting applied research to benefit local farmers and provide another opportunity to educate community members about modern agricultural practices.

#### **Farm and Financial/Risk Management**

Farm and financial/risk management skills are more important than ever due to volatile agricultural commodity prices and increasing input costs for farm owners/managers. Respondents in the needs assessment ranked farm financial/business management as their highest educational priority ([Exhibit 1](#)). Cost of production was identified as the uppermost topic of interest under this category while farm transfers/succession planning, financial management, business plans, farm recordkeeping and farm tax management were closely ranked as subsequent educational priorities.

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### **Farm and Financial/Risk Management (continued)**

Farm owners/managers across all agriculture enterprises need effective financial and risk management skills regardless of their type of operation. I developed teaching materials, conducted workshops, and held one-on-one consultations for a wide audience, ensuring inclusion of all who have a vested interest in their farm's business. As the agricultural economy of Wisconsin and the nation continues to challenge producers, farm and financial/risk management educational programs will involve all stakeholders, including agriculture professionals.

#### **Financial Management**

Increased volatility in agricultural commodity markets and tighter profit margins in recent years have prompted stricter lending standards by financial institutions for farm owners/managers seeking credit. Farm owners/managers are being asked by their agricultural loan officers to provide detailed business documentation when applying for annual operating loans, the purchase or refinance of equipment or livestock, and the purchase of land or building improvements. My previous experience as an agricultural loan officer is well suited to assist farm owners/managers in improving their financial recordkeeping and conducting farm financial analysis of their business to use when applying for credit.

I conducted a Farm Recordkeeping workshop in 2011 that included my presentation on the financial documents necessary for analyzing the farm business financial records and their importance in making management decisions. This seminar also included sessions on managing records for farm use, tax reporting, and a review of the various recordkeeping systems which are available to farm owners/managers. In the post-workshop evaluation (n=7), participants indicated they found the information to be useful for their business/farm and increased their knowledge from 3.0 to 4.0 (Likert scale: 1=poor to 5=excellent). One participant remarked on the usefulness of my presentation, "*Great job – I feel more comfortable to get this done & get the banker numbers*" ([Exhibit 14](#)).

The financial accounting software program QuickBooks®, a tool to assist a small business with their computerized financial recordkeeping, was referenced during the Farm Recordkeeping Workshop. QuickBooks® has become popular among farm owners/managers. Training for this software program is limited and may not be specifically provided for agricultural clientele. For the past five years, I have collaborated with UW CDP Assistant Director Jenny Vanderlin, UW-River Falls Department of Agricultural Economics Professor Dr. Stan Schraufnagel, and Chippewa Valley Technical College (CVTC) farm business management instructors to offer eight workshops in Dunn County. Participants develop a set of farm financial records while learning basic accounting skills and how to modify the QuickBooks® software program to meet their farm business recordkeeping needs.

Attendees of these workshops were asked to complete a multi-year program evaluation in 2015. Half of the respondents (n=22) have had no more than a single day of QuickBooks® training in the past and UW-Extension was the primary provider of this training. Forty-five percent indicated the workshop increased their use of the software program. Over half of the respondents rated the overall usefulness of the workshop as above average or very useful. One respondent noted an additional benefit of attending the session was, "*last time I learned a lot from other participants – ways they used certain parts of the program, etc.*" ([Exhibit 15](#)).

Building on these recordkeeping workshops, I collaborated with UW-Extension Agriculture Agents Ryan Sterry and Jennifer Blazek, Jenny Vanderlin, and UW-River Falls Department of Agricultural Economics Professor Dr. Nate Splett, to develop a hands-on program designed for farm women titled Annie's Project – Financial Management workshop series. A baseline survey was collected from participants to determine their type of farm business, current recordkeeping system and if they were already completing any financial analysis. The session I co-taught on completing a budget for your farm operation included budgets for traditional commodities (dairy and crops) and reviewed budgets for non-traditional agriculture enterprises (fruit and vegetables). I also taught a session on available recordkeeping systems and led them through a records exercise. All of the respondents in a post-workshop evaluation (n=7) agreed this presentation helped them to understand what records they should keep to make better decisions for their farm business ([Exhibit 16](#)). Participant comments on this workshop included:

- "*Overall, I plan to work on this information and use it to plan, budget, and analyze my farm business. I'm also going to be asking lots of questions of my CPA friend – now that I have the language and some rudimentary understanding of what to ask about.*"
- "*Excellent workshop – so practical. 2014 will be the year for our farm profits with the tools learned in this workshop. Value-added focus is wonderful!*"

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### **Farm and Financial/Risk Management / Financial Management (continued)**

Participants' feedback on this series indicated the importance of providing this type of financial management educational programming. I plan to continue offering Annie's Project programs focused on specific topics of interest to farm women. I have taught sessions on introductory farm financial management topics, but in the future I would like to focus on areas which would assist farm women with a more in-depth understanding of financial management concepts and the application of these concepts for decision-making within their farm business enterprise.

#### **Price Risk Management**

Financial management is a key component when farm owners/managers are looking to calculate their farm's cost of production and determine future profit margins. Farm revenue variability is a major source of risk since farm operating expenses have increased steadily in recent years. Grain and milk commodity prices have been volatile: the price of corn in the last three years has ranged from \$3.48 per bushel to \$7.63 per bushel. This situation would be comparable to a commissioned salesperson earning an average salary of \$55,000 per year, with the amount received in any one year ranging from \$34,800 to \$76,300. The commodity price which farm owners/managers receive for their product directly impacts their revenue, profitability, and their continued success in the agriculture industry. With the volatility in commodity prices, many farm owners/managers have requested price risk management programming. Price risk management tools can increase the probability that commodities will be sold at prices above the farm's cost of production, thereby decreasing risk and improving the farm's profit margin.

To address this need, I collaborated with Edward Usset, Grain Marketing Specialist at the University of Minnesota Center for Farm Financial Management, to adapt the Winning the Game™ programs for use by educators in Wisconsin. I worked with Mr. Usset to include WI commodity grain prices and determine cost of production values for past years. I also coordinated with Mr. Usset to provide two train-the-trainer sessions for UW-Extension Agriculture Agents, UWEX State Specialists, and technical college farm business management instructors. To fund the adaptation and train-the-trainer programs, I was awarded a UW-Extension Western District Resource Management Innovative Grant (\$1,000), co-wrote a UW-Extension Central District Resource Management Innovative Grant (\$1,500), and received \$3,000 from the UW-Extension ANRE Grains and Farm and Risk Management (FARM) teams. The train-the-trainer sessions were attended by 28 educators who in turn have taught 21 workshops for 281 participants.

Winning the Game™ programs feature a realistic and fun simulation game to provide a different approach for learning about price risk management. I partnered with local crop insurance agents, UW-Extension Agriculture Agent Jerry Clark, and UWEX State Specialist Brenda Boetel to teach five Winning the Game™ workshops to participants in Barron, Chippewa and Dunn counties. Seminar topics included crop insurance updates, marketing terminology, and key components when creating marketing plans. A written marketing plan is an important tool which can assist farm owners/managers in taking a disciplined approach to marketing their commodity and reducing their overall price risk. Edward Usset has expressed this important concept for farm owners/managers as, "*Great marketing is not finding the high price; it's finding an extra 10-20 cents per bushel with a solid plan that avoids mistakes.*"

Post-workshop evaluations were collected from four Winning the Game™ Pre-Harvest Grain Marketing workshops I co-taught. A majority of the respondents (n=43) indicated they planned to use the information from the workshop to develop a pre-harvest crop marketing plan and intended to pre-harvest market their grain. Surveys indicated farm owners/managers expected to plant 7,581 acres of corn and 3,579 acres of soybeans. Based on responses for the maximum percent of the expected crop which they planned to pre-harvest market, the potential additional total profit for these farm owners/managers would equate to \$78,454 for corn and \$8,761 for soybeans. The evaluation revealed respondents agreed or strongly agreed that they better understand the importance of pre-harvest marketing, fixed price and minimum price marketing tools, how to modify their pre-harvest marketing plan, and were prepared to write a plan after attending the workshop. One participant noted, "[A] simple approach to [a] good market plan," while another commented, "Speakers seemed well qualified and knowledgeable" ([Exhibit 17](#)).

I obtained survey information from attendees one year after participating in a Winning the Game™ Pre-Harvest Grain Marketing workshop taught by UW-Extension educators. Eighty-eight percent of respondents (n=30) indicated their participation in the workshop helped them to make a decision on marketing their grain in the future. Over half of respondents reported they pre-harvest marketed 45 percent of 6,507 acres of corn and 68 percent of 4,017 acres of soybeans. The additional total profit realized by farm owners/managers equates to \$62,461 for corn and \$16,791 for soybeans ([Exhibit 18](#)).

When asked to list items learned or actions taken as a result of participating in the Winning the Game™ program, respondents commented:

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### **Farm and Financial/Risk Management / Price Risk Management (continued)**

- *“I made a decision to sell when [price was] over cost of production and continue to sell on the way up.”*
- *“Worked on cost of production; Learned to not always sell by it; Learning (slowly) not to hang on to unpriced corn.”*

In the follow up survey to the Winning the Game™ program, participants reported measuring their cost of production was the most used skill on their farm. Comments from these evaluations indicated participants still needed definitions of market terminology and methods for calculating cost of production. I collaborated with Jerry Clark, Brenda Boetel, and CVTC farm business management instructor Mark Denk to update the UW-Extension AgVentures Grain Marketing curriculum in 2015. I was awarded funding from the ANRE Grains and FARM teams to renew the use of the Winning the Game™ simulation game for another year. During the first day of the program series AgVentures Grain Marketing and Cost of Production, I taught sessions titled “What is Risk and Price Risk Management” ([Exhibit 19](#)) and “Developing a Marketing Plan.” Participants were given two assignments after this first workshop: to calculate their farm’s cost of production and draft their own marketing plan. During the second day of the program series, I facilitated the Winning the Game™ simulation game and allowed the participants to put their marketing plan into action. During the program series, participants commented on how they are now able to calculate their cost of production and were planning to pre-harvest market a portion of their crop to ensure a higher profit margin in 2015.

#### **Farm Management**

Each year farm owners/managers calculate their farm’s cost of production and evaluate options to reduce their operating expenses to ensure a higher profit margin. One expense that may be reduced is the cash price paid for renting farmland, which has steadily increased in Dunn County from \$66 per acre in 2008 to \$104 per acre in 2014 (USDA NASS WI Survey). The amount of rented farmland in the county has also increased with 55,223 acres in 1997 as compared to 97,377 rented acres in 2012 (USDA Census of Agriculture).

*“Can you tell me what the cash rental rate is for farmland in Dunn County?”* is one of the most frequently asked questions received by the UW-Extension office in Dunn County each year. Limited county-level farmland cash rental rate data is available. I have surveyed, tabulated and published the results of this survey data collection in an annual factsheet. The factsheet has been made available as downloads from the UW-Extension Dunn County website, printed copies at UW-Extension office and other Dunn County government agencies. I have also utilized this data and the factsheet for presentations and to answer individual phone or in-person questions ([Exhibit 20](#)).

In 2011, I led the western Wisconsin farmland cash rental rate survey project and provided UW-Extension Agriculture Agents with a county kit I had developed. I compiled and summarized the results from participating counties in a factsheet. This farmland cash rental rate factsheet was distributed to attendees during UW-Extension workshops, Western Wisconsin Ag Lenders Conference, and was published on the UW-Extension ANRE FARM team website. I was selected to present the results from these efforts to my peers during the UW-Extension ANRE All-Colleague Conference.

I authored a three-part article on farmland rental and written lease agreements which has been published in the local *Chippewa Valley Agriculture Extension Report* and *The Dunn County News* ([Exhibit 21](#)). The article provided information on establishing and determining cash farmland rental rates, and outlined the various components necessary for a written farmland lease agreement. It is important that farmland rental agreements be in writing and agreed upon by both landowner and farm owner/manager. Written farmland lease agreements encourage a detailed discussion leading to a better understanding by both parties. Written lease agreements also serve as a reminder of the terms originally agreed upon, and provides a valuable guide for heirs.

Utilization of the western Wisconsin farmland cash rental rate survey factsheet was high and UW-Extension Agriculture Agents used this as a springboard for seven Renting Farm Assets workshops. I have offered this workshop in Dunn County three times; and I have provided resources for farmland rental rate pricing, written lease agreements, and presented the summarized results from the Dunn County and western Wisconsin farmland cash rental rate surveys. Post-program evaluations of this workshop held in 2012 found the majority of respondents (n=15) increased their knowledge of these topics and intended to utilize the information for informed decision-making related to negotiating and developing written lease agreements. Participants realized the importance of a written lease agreement after attending the workshop based on the increase in average scores, from 2.33 pre-program to 3.87 post-program (Likert scale: 1=no to 4=yes). Five respondents planned to establish written lease agreements and *“do written leases instead of [a] handshake”* ([Exhibit 22](#)).

## **Statement of Professional Contributions and Scholarship**

### **Farm and Financial/Risk Management / Farm Management (continued)**

I worked with the 2014 ANRE Program Area Intern to gather information with which to evaluate the use of the farmland rental rate factsheet produced by the Dunn, Pierce, and St. Croix County UW-Extension offices and determine the potential educational impacts resulting from these factsheets. As noted in the report, the factsheet has a relatively high level of use with nearly 70 percent of the respondents (n=453) stating they have used the UW-Extension farmland rental rate factsheet within the past three years. Most users of the factsheet (72%) used it to be aware of current rental rates and corn yields in their local area ([Exhibit 23](#)).

While this evaluation sought to answer the question about the use of the farmland rental rate factsheets, another important outcome was to determine if respondents were involved in written farmland leases each year along with the number of these written lease agreements. The survey results suggest about 15 percent of total rented farmland in the three counties is covered by a written lease agreement. Most respondents are involved in only one or two leases covering no more than 250 acres of farmland. It is important that continued agriculture educational programming be offered to increase the use of the farmland rental rate factsheet and written lease agreements in Dunn County. I will be redesigning the annual farmland cash rental rate survey to gather this data and collect additional information to continue assisting farm owners/managers.

#### **Farm Succession**

A generation ago, transferring the family farm may have been a fairly simple process. Tighter profit margins, increased volatility in agricultural commodities, increased land values, larger size farms, and increased cost of living expenses have amplified the uncertainty as to whether the family farm can be passed down from today's farm owner/manager to the next generation. The average age of principal farm operators in Dunn County is 57 years old (USDA Census of Agriculture, 2012). With an aging farm owner/manager population, more producers are looking for information on retirement or transferring their farm in the next 10-15 years. To address these needs, I have collaborated with UW-Extension Agriculture Agents to provide five farm transfer/succession planning workshops. While the content of each workshop has varied, the objective of giving farm owners/managers the tools needed to review their farm transfer or succession options have remained the same.

I coordinated the Transferring the Farm in a High Stakes Era workshop in 2012 with CVTC farm business management instructors ([Exhibit 24](#)). The workshop was designed for farm families to explore farm succession issues and considerations for both beginning and retiring farm family members. The workshop evaluation (n=25) indicated all participants received information which was useful for their business/farm. The workshop included two sessions for all family members as well as breakout sessions. I presented on land and building rental arrangements to meet the needs of both parties in a farm transfer situation. When asked about my session, the evaluation results indicated participants increased their knowledge from 1.89 to 3.44 (Likert scale: 1=poor to 5=excellent). As a result of attending this workshop, over half of the participants planned to meet with a consultant (UW-Extension, lawyer, etc.) to start the farm succession planning process ([Exhibit 25](#)).

I conducted twelve individual farm transfer and succession education consultations per year, and provided assistance on farm succession issues by contributing to the monthly Agrivision column for the *Wisconsin Agriculturist* magazine ([Exhibit 26](#)). Meetings with farm owners/managers may require two to five visits when working on extensive financial projections for a farm business expansion or to facilitate discussions with farm family members to determine goals and future plans for the farm business. I worked with farm owners/managers to review objective data on which to base their farm transfer and succession decision prior to making a financial commitment and pursuing legal advice. I also worked with the farm families closely in utilizing the University of Minnesota FINPACK® (farm financial planning and analysis) software program to create financial projections that they could use when making management decisions for their farm business.

**Farm Succession - Case Study A:** I first met with Producer A in early 2011 to review possible dairy farm expansion plans that would allow their son to have a full-time management role with the farm. Producer A was considering an expansion of the dairy herd, construction of a new freestall barn and manure storage system. This would provide for the existing stall barn to be retrofitted and install a new milking parlor. I worked with the farm to create four financial projections to consider for this farm expansion. Producer A chose not to expand that year after review of the projections indicated annual cash flow would not be sufficient to fund the proposed expansion. I advised the farm to continue to pay down outstanding debt and met with Producer A at the end of 2011 to again review two potential dairy farm expansion plans. I also coordinated a farm visit with UW-Extension Biological Systems Engineer David Kammel to visit the farm and provide guidance for the construction of the new freestall barn and manure storage system. In 2012, the farm made the decision to proceed with their expansion plans. I have continued to meet with Producer A on an annual basis to complete financial projections for continued herd expansion, capital purchases, and building construction projects. I also assisted Producer A in the review of their actual farm cash flow

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### **Farm and Financial/Risk Management / Farm Succession (continued)**

and its comparison to the financial projection for the year. Producer A expanded the dairy herd from 147 to 350 cows and increased milk production ten pounds per cow per day, as was originally projected. Gross revenues for the farm were projected to increase \$469,686 and have increased \$850,000. This farm family modernized their farm and ensured their farm business will be viable for the next generation ([Exhibit 27](#)).

Farm Succession - Case Study B: In 2014, Producer B requested assistance with communicating and defining their farm business goals. Producer B's husband passed away five years ago and she has relied on a herdsman to assist her in operating the 60 cow dairy herd. She has two sons interested in taking an increased management role on the farm. I facilitated discussions with Producer B, the herdsman, and the two sons to develop job descriptions and a vision for the farm business. During these meetings it was determined the herdsman and sons preferred the dairy herd to remain at its current size. Future emphasis would be placed on the modernization of current facilities and purchase of farmland to expand the crop enterprise. I worked with Producer B to create three financial projections. Producer B did remodel their stall barn to expand the dairy herd from 60 to 70 cows, constructed a new heifer barn, purchased an additional 80 acres of farmland, and continues to explore opportunities which would allow both sons to take on an increased management role in the farm business ([Exhibit 28](#)).

Farm transfer/succession planning workshop attendees were asked to complete a multi-year program evaluation (n=23) in 2015. Two farm owners/managers have completed their transfer plan as a result of the program in which they attended; 43 percent of respondents are 50 percent completed. One respondent indicated, "*We formed a LLC business to start the process.*" Over half of the respondents have developed or updated their will or estate plan as a result of their attendance in a workshop; five farm owners/managers indicated they have completed this process. Another farm owner/manager reported they have "*completed [a] personal will with a revocable trust and had discussion with [their] children*" ([Exhibit 29](#)).

Many respondents noted finding a consultant and finding the time to complete the tasks were obstacles or problems which have slowed or stopped their progress in starting or finishing their farm business transfer or succession plan. One farm owner/manager also noted, "*Not able to develop goals, [since] not knowing what our options are*" ([Exhibit 29](#)). Farm transfer and succession issues can be difficult to evaluate because time, planning, and patience are important pieces to the process. For many participants of these workshops, the farm succession and transfer process is a work in progress which I will continue to support and evaluate in the future. The aging farm population trend means there is a current and future need to provide educational support to those working through the potentially complicated process of transferring their farm business. This could include the sale of the farm or reviewing options in which to transfer the farm to the next generation. The difficulties faced by the new generation of farm owners/managers are substantial as well, resulting in a need to strengthen the farm and financial/risk management skills of this generation.

### **Summary Reflections**

Since starting my position as Agriculture Agent in Dunn County, balancing the growing and diverse needs for agriculture educational programming has been a challenge. Professional development opportunities and continuous support from UW-Extension colleagues have assisted me in overcoming these obstacles. One challenge of providing effective programming led me to employ technology in the distribution of information and resources. While this has not always been an interest, I see how technology can be used to increase efficiencies in my workload and as a tool in communicating with audiences. I have had the opportunity to work with other UW-Extension colleagues to learn, utilize, and benefit from new forms of data collection and more efficient electronic distribution. I collaborated with UW-Extension Building Community Capacity through Broadband outreach educator Jill Hietpas and UW-Extension Agriculture Agent Jerry Clark to introduce tablets and demonstrate UW-Extension-developed applications during the Crop Scouting and Diagnostic Clinic. This work was featured in the UW Colleges and UW-Extension Transforming Lives and Communities Annual Report 2012 ([Exhibit 30](#)).

As my educational programming has changed, I have learned that workshop presentations are only one part of potential learning opportunities for clientele. Other tools include on-farm research and demonstrations, networking, evaluation, and relationship building with stakeholders. I have a strong network of UW-Extension colleagues who have strengthened and supported my programming efforts. I will continue to use the experience, knowledge, and skills that I have gained in this process to create and build quality educational programs for Dunn County stakeholders and UW-Extension clientele. I am excited about continuing to offer agriculture educational programming to support these audiences and the continuance of agriculture in Dunn County.