

Facilitating Producer Study Groups: Roles, Duties, & Responsibilities

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FACILITATING PRODUCER STUDY GROUPS: ROLES, DUTIES, & TECHNIQUES

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Author's background:

Woody Lane is a nationally-known livestock nutritionist and forage specialist living in Roseburg, Oregon. He owns and operates an independent consulting firm "Lane Livestock Services," teaches courses in forages and livestock nutrition to ranchers in the area, facilitates three private producer study groups for farmers and ranchers in western Oregon, and writes the monthly column "From the Feed Trough..." for *The Shepherd* magazine. Woody earned his Ph.D. and M.S. degrees in animal nutrition from Cornell University. In the 1980s he was the State Extension Sheep and Beef Cattle Specialist for the University of Wisconsin, and in the 1970s he was an animal scientist with the Allegheny Highlands Project in West Virginia. Woody is in great demand as a speaker for nutrition and forage workshops. His pioneering development of producer study groups in Oregon is a unique program that has set the standard for the formation of self-sustaining producer groups throughout the United States.

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A. Basic Concepts

1. A producer study group is a closed, private organization.
2. Members pay dues — generally at six-month intervals. Membership must be for well-defined periods. Membership cannot be on a month-to-month basis.
3. The group hires an outside person to be its facilitator.
4. The facilitator is essentially a contractor who works for the group.
5. Neither the group nor the facilitator owes anything to the general public. A producer study group is *not* an open meeting where the public can attend and expect answers and service from the facilitator or group members.
6. From the facilitator's perspective, *the group comes first. Members are clients. The facilitator works for them.*
7. The facilitator must *always* respect the privacy and confidentiality of the members.
8. Members reserve the right to assess the facilitator's performance, suggest changes, and if necessary, hire someone else.
9. The facilitator should be a private individual who is has a contractual arrangement with the group. The fiscal structure of a producer study group means that the facilitator should *not* be the local county Extension Agent or other government employee. A facilitator cannot serve two masters. However, the local county Extension Agent can help a group locate or identify potential facilitators.
10. The main purpose of the group is to benefit each member's operation. Benefits can be defined and perceived in many ways. Benefits include technical information, peer support, cooperative contacts, sharing of experiences and opportunities, critical evaluation, and many others. Members are not alike — each member makes a judgement about the group's value based on his own goals, expectations, and experiences.
11. *A producer study group should be a technically advanced group.* At its most effective level, the group discussions should assume a basic understanding of forages, fertility, grazing, nutrition, etc. These are not absolute prerequisites, but they greatly help. Group members learn from each other as well as from the facilitator and other resources. This is a source of strength and pride.

B. Forming A Group – (1) Background

1. A group cannot be formed by simply asking some folks to meet and “begin a group.” Calling for a general public meeting to decide about the formation of a study group does not necessarily attract key participants. A “come-all” public meeting will, however, attract folks with unknown backgrounds and agendas. Some be strong naysayers, or have alternative agendas, and such a meeting could become a discouraging experience.

2. Initial members should have already shared a common experience — for example, a multi-week course, or an extended workshop, or a long group tour, etc. They should have something *in common* so that they know each other and have some background technical knowledge. Ideally, they should already consider themselves part of a specialized subset of knowledgeable producers. The formation of a study group then becomes the logical outgrowth of this subset.
3. *This means that your plans and preliminary actions for forming a study group should begin months in advance of the first planning meeting.* You may have to arrange for that preliminary common experience, like a multi-week course or specialized multi-day workshop or tour. Time and timing is important — use it carefully and wisely.
4. Invite people who are likely to be supportive of a group effort. Initially avoid people who have negative attitudes or overt political agendas or who would become behavior issues in a group.
5. Remember that a closed, dues-based study group is the *variant* arrangement in the United States, not the norm. Most producers have never seen or heard of such an organization, or they may have negative feelings about it because of its New Zealand connotations or because they believe that a private group conflicts with or duplicates the Extension Service. Remember, you are not trying to convince *all* the local producers, just the progressive producers who may be interested and have positive perceptions about forming a group.
6. Cross the barriers of livestock species. *This is important.* The basis of a group should be inclusive, not exclusive. Don't organize a "sheep group" or "dairy group" or "alpaca group". Don't organize a group composed only of "holistic management producers" or "large commercial producers". Resist the exclusivity comments of some potential members. One of the main strengths of a producer study group is its varied membership. Members with different backgrounds bring different ideas and perspectives and skills to the group. Over time, these will be shared, and everyone gains from this knowledge. One reality is that, historically, cross-species groups were rare, so therefore most producers have never experienced this type of interaction and may be suspicious of it at first. Your task will be to get them through the front door and allow them to experience first-hand the strengths of a well-functioning inter-species group.
7. Grazing is not a religion. The use of forages is a prudent business decision. While intensive grazing is usually a good business practice, there are also other ways of feeding animals and using forages. MIG should not be the only criterion for group membership.
8. Setting significant fees (eg. \$200+ /year) helps screen potential members. A group thrives if its members actively participate and take its activities seriously. Money talks. If a producer is willing to pay those membership fees, then they are serious enough to join.
9. A group should, however, screen potential members for the prerequisite of basic knowledge. Remember, a producer study group should be an *advanced* group of producers who build on their knowledge.
 - a. For example, the group can insist that all new members should have taken available forage courses or should be established graziers with considerable experience.

- b. This strategy helps insure that new members will contribute to the group rather than just sit along the sidelines and take notes, or worse, ask a lot of basic questions and reduce the level of the technical discussions.

C. Forming A Group – (2) Initial Planning Meetings

1. Begin with a relaxed general organizational meeting — hold a pasture walk, a potluck, and a sample “technical discussion” or other practical exercise that would duplicate a real group meeting. Do things that a formal group would do. This initial meeting should *not* be a formal workshop (therefore, no guest speaker). End this meeting on time — no more than 3 hours. Set the precedent of professional respect for scheduling.
2. At this first gathering, set aside sufficient time (1 hour) to discuss possibilities and interest of forming a group. This period should *not* be done at the end of a formal workshop.
3. Three things must be discussed:
 - a. Goals of a group. What do the members want?
 - b. Organizational Framework.
 - c. Money.
4. Do not get hung up about goals. This is less important than you would think. Don't spend much time on this topic. Producers are not generally used to articulating goals, especially in a group setting. At these initial sessions, people don't know what a group can do, so their comments will usually reflect their past experiences and also their desire to say what sounds good to others. All you want from this topic is a general sense of what folks may want from a group — technical expertise, types of topics, interactive sharing, etc. But I emphasize — *don't spend much time on this.*
5. Address the money issue during this initial discussion. Be straightforward. Have your numbers already prepared. Who pays whom (you) how much? This topic is essentially a business proposal. Also prepare a set of alternative funding mechanisms and amounts, and possibly identify some startup/help funds for the first period or first year. Have a general plan for increasing membership. Stress that membership (and fees) are *per operation*, not per person. Present a comfortable organizational framework to the group. “Let's form a group” is not a sufficient organizational plan.
6. *After* the discussion about organizational structure and money, go around the room and ask for an initial commitment, *if appropriate*. Gauge the attendees carefully before you do this. Some may say yes, some may say no, especially after they consider the money issue. Timing may be critical. Possibly put this topic off until the second gathering. However, by the end of the second planning meeting, commitments should be firm and dependable. Monies should be collected by the third meeting.

7. At the second meeting, if the group decides to form itself, identify a potential treasurer. This cements the group's structure and reinforces the perception that the group is a professional organization.
8. By the fourth or fifth meeting, choose a group name. A name confers a concrete identity to the group, and it can be a source of pride for the members. Make this name selection a fun, light-hearted activity. Members should decide themselves, possibly by vote. The group (or you) can offer a prize. Remember that good acronyms are always a good idea.

D. Group Size

1. 15–20 members is a nice size, but see additional notes in this section.
2. A “member” is defined as an operation, not a single person. Membership means that the entire operation has a place at the table, and that anyone from that operation can attend. Therefore, a member operation pays one membership fee, but the husband, wife, children, and hired hands can all attend meetings under that membership. In reality, only one or two folks from an operation will actually be interested in attending a meeting.
3. Consider your revenue requirements. Facilitator payment is based on available funds. The group may require 20-25 members to meet funding obligations. Alternatively, the group may establish higher membership dues or identify outside funds to supplement its income.
4. Remember that many meetings will be held in host livingrooms. Most livingrooms can fit only 15-20 people comfortably.
5. At any meeting, only 60-80% of the member operations will attend. In more than 12 years of meetings, we have *never* achieved 100% attendance at any meeting. A membership level of 20–25 operations results in an average attendance of 12–20 people. This is a good meeting size, because there are enough folks for discussion and sharing and different perspectives.

E. Organizational Framework of the Group

1. The Facilitator does the background administration tasks — communications, announcements, meeting setup, schedule arrangements, guest arrangements, etc.
2. Treasurer: the group selects one of its members. The treasurer is an ongoing position. It should not be a revolving position. The treasurer role should be changed only when absolutely necessary.
3. Bank Account: the group should have a bank account under its own name. Funds should *never* be commingled with any member's account! There should be two members who can sign checks.
4. The facilitator should *not* have check-signing privileges.

5. A separate bank account may require that the group have a "Tax Exempt" status — each state is different. Submitting tax returns will depend on state laws.
6. No minutes or corporate reports are necessary.
7. No president or other "officers" — all members are equal. (although one member is the treasurer who maintains the account).
8. You may want to arrange for 2–3 members to be your advisory committee — people you can visit about plans, topics, and other ideas relating to the group. This would be kind of like an executive committee. This subgroup can be formed on a rotating basis (i.e. different members every year).
9. The Group hires its facilitator. The facilitator is essentially an independent contractor.
10. The Facilitator invoices the group for each 6-month period.

F. Finances

1. A Producer Study Group is a closed, private, fee-based organization. The group uses its funds to hire you as the facilitator.
2. Membership fees should be paid for a standard (multi-month) period of time.
 - a. Recommended period = 6 months.
 - b. Membership should *not* be assessed on a month-to-month basis.
3. If you decide on 6-month fee periods, allocate them as *January-through-June* and *July-through-December*. This pattern is easy to remember, which is especially practical if you facilitate more than one group. In this case, membership fees would be due in January and July.
4. Membership fees should be at least \$75 *per period*. \$100 is better. \$125-150-\$200 would be better yet. (Typical semiannual fees in New Zealand are \$150-\$200). The group and you negotiate this and decide what is most appropriate. If you reduce your facilitator fees, remember that it will be difficult to increase them in the future.
5. *Do not organize a group with free or minimal membership fees.* Put a value on joining the group and make it work. Membership needs to be worth a financial amount. One of the main strengths of a private study group is its ability to support itself. Paying significant membership fees puts a clear commercial value on the knowledge and group experience. Membership fees convey a seriousness and professionalism and also helps screen potential members.
6. If an outside grant is obtained, it can be used to fill an income gap in a small group. (i.e. membership slots that are still open). *A grant should not replace or reduce the membership fees of active members*, because such an action will mask the true value of the group, and when the grant runs out, membership fees will rise and there is a significant risk that many members will leave.

7. The producer study group should maintain a checking account under its own name. *Under no circumstances* should these funds be commingled in the same account of one of the members or of the facilitator.
8. Membership checks should be made out to the Group and given directly to the treasurer. As the facilitator, you should not handle membership monies.
9. The treasurer is responsible for maintaining the bank account, invoicing members, writing checks, etc. You will need to work with the treasurer on these details.
10. As the facilitator, always keep the treasurer informed about new and potential members, members who drop out of the group, and anything else that could be important to the group's administration. Work closely with the treasurer and show appreciation for his efforts. Help as much as possible. If necessary, *you* should be the person to speak to any members who are tardy with their dues — to shield the treasurer from this unpleasant task. (Unless, of course, the treasurer is eager to do this himself). After all, you are being paid and the treasurer is not.
11. You should invoice the group for your Facilitator fees during the 6-month period.
12. Coordinate the timing of your invoice with the treasurer regarding status of the group's bank account. This will help with the group's cash-flow.
13. Perspective members should be allowed to attend 1-3 meetings as guests — with no obligations or payment requirements.
14. Once a person decides to become a member —
 - a. If this occurs prior to the first meeting of a 6-month period, then assess the full 6-month membership fee.
 - b. If this occurs in the middle of a 6-month period, then assess a pro-rated fee.

G. Meeting Schedule

1. Some Possible Options:
 - a. 12x/year – monthly.
 - b. 6x/year – bimonthly. (See notes below).
 - c. 8x/year – sequences of monthly (Nov, Dec, Jan, Feb. March) and bimonthly (May, July, Sept). The bimonthly sequence would occur during periods of heavy field activities and other interfering responsibilities.
 - d. Other schedules are possible.
2. December meeting – “Holiday Potluck” — non-technical, show slides, etc. Party atmosphere. Encourage families to attend.
3. Meeting days — there are many possible options:

- a. Same day of each month (eg. 2nd Tuesday).
 - b. Allocated over a 2-week period, with 1-3 weekdays possible.
 - c. Summer meeting days can be different than winter meeting days — due to daylength considerations.
 - d. Remember that when you decide on a meeting strategy, as the facilitator, you must attend *all* the meetings.
4. Members are busy adults. The group must consider their schedules carefully. Each group will work out the best arrangement for its members. There is no reason why the meetings must be on the same day each month, unless the group wants it that way. Although there is no universal answer to this issue, keep the schedule simple and consistent. This will pay off in the long run.
- a. It is very difficult to schedule the same day each month.
 - b. Survey the members and compile a monthly chart that shows the best and worst meeting days. Decide on a meeting schedule based on this chart. Because of changes in membership and personal calendars, redo this survey every 18 months or so.
5. Select dates for 3 months at a time, if possible. This will make it easier for members to attend, because they can mark their calendars in advance and also, if they are in tight work schedules (like in the medical field), they can request those days or hours off.
6. Number of meetings per year — may effect how members feel about the level of membership fees. This can be a sensitive topic. Work it out carefully. Realize that this arrangement is difficult to change once it is in place.
7. Bimonthly meetings have a significant drawback – the time period between meetings is eight weeks. This length of time can reduce the sense of continuity within the group. Also, this amount of time can work against active membership. If someone misses *one* meeting, then that member doesn't participate or see the other members for at least 16 weeks. If someone misses *two* meetings, then the lapse is six months. That's a long time, usually too long. Members who miss two successive meetings in a bimonthly schedule will probably drop out of the group — which is detrimental to group stability, usefulness, and continuity. Also, long periods between meetings makes it difficult for new members to feel accepted as part of the group or gain much from the group, since the group meets so infrequently.

H. Study Group Meetings – (1) Logistics

1. As the facilitator, you have the mandate to keep the meeting moving and on time.
2. Meeting length — typically 3 hours. Meeting length should be consistent and decided by group members. Many factors will influence the meeting length. However, the meeting length should be at least twice as long as the longest one-way drive to the site.
3. Starting time — should be decided by group members. This also should be consistent.

4. Consistency in start time and meeting length will improve attendance.
5. Arrive at the meeting site at least 30 minutes prior to the start time. Get everything ready for the meeting. Set up equipment, white boards, computers, speakerphones, etc. Be prepared to begin on time.
6. Make sure that all electronic and telephone equipment works properly *before* the meeting begins.
7. Call the meeting to order on time. Welcome everyone, introduce guests, identify the hosts, begin the meeting.
8. End the meeting on time. This gives a clear framework for a working meeting.
9. When ending the meeting, do it formally. Bring people together. Remind everyone about the date of the next meeting. Thank the hosts and guests and say something like “Thanks for coming”. This gives a comfortable closure to the end of the meeting and reinforces the professionalism of the event.

I. Study Group Meetings – (2) How to Conduct Them

1. Meetings consist of 3 or 4 discrete segments:
 - a. Pasture Walk.
 - b. Focus Topic.
 - c. Sharing situations, problems, experiences.
 - d. Announcements.
2. Be flexible.
 - a. If it's too hot or too rainy at that moment, postpone the pasture walk until later in the meeting.
 - b. Flow with the discussion; be flexible with the focus topic. If people are concerned about a particular subject and begin discussing it, capitalize on this interest, follow the group, and add input as appropriate. Don't automatically shift back to the “originally-planned” topic. But use judgement here. Becoming sidetracked to a good topic is a good thing; becoming sidetracked to wasted time is a bad thing.
 - c. Flexibility is important, and it should be tempered with good judgement. Timing, sensitivity, responsibility — *always* remember that as the facilitator, you work for the members and must keep their best interests in mind.
3. Arrange chairs in a circle during the indoor portion of the meeting, rather than in rows for a formal lecture. A circle will encourage interaction between members. It is all-too-easy to fall into a pattern of top-down, one-way information flow if people are sitting as in a lecture.

4. During the meeting, avoid extraneous discussions about politics, sports, and religion. These are topics that members can discuss after the meeting is over. Keep the meeting focused on the professional and technical issues at hand.
5. A producer study group is not a debating society about politics or religion. These types of controversial discussions can make individual members uncomfortable. Members may not say anything about their discomfort, but if they don't feel good about meetings, they will stop attending.
6. If a member or guest launches into an extraneous topic, tactfully move the conversation back to the focus topic of the meeting. Don't draw attention to the breach. Diplomacy and respect are very important. If necessary, you can speak to the individual privately at a different time to alert him of the issue.
7. Guests are guests. Make them feel welcome and appreciated. If a guest speaker says something that you disagree with, especially if it's a technical item, be careful about objecting or contradicting him. The group is not your private fiefdom. Members should be able to hear that person in full. They can make their own decisions about the quality of the information. Isn't that what the group is for?
8. With other guests, check with them during the meeting — make sure that they feel comfortable. During the pasture tour, walk with them for a bit and visit. Bring them into the discussions like any other member. They may have good things to add to the discussions.

J. Group Dynamics

1. Basic assumptions during meetings = trust and confidentiality.
 - a. "What's said in the shed, stays in the shed" (A phrase from New Zealand)
 - b. Private information must remain private.
 - c. Members will feel comfortable about talking about strengths, weaknesses, and finances only if they are confident that their information will not be told to others. If necessary, you should articulate and reiterate this point at meetings.
2. Watch for antagonisms between members. Always maintain the Group Meeting as a trusted, neutral ground. Be very sensitive to local involvements and history. Antagonisms can be quite subtle. Watch who sits where and who doesn't interact with whom.
3. Don't allow strong individuals to dominate the discussions to the exclusion of quieter members. But be tactful.
4. When potential members want to join (after their invited guest period) — always poll current members and accommodate their wishes. If any members have concerns, these take priority over the desires of a non-member. This maintains the long-term health of the group.

K. Activities During the Meeting

1. Pasture Walk — always hold a pasture walk unless too dark or too cold.
2. Tour of other facilities (barns, laboratories, feedyards, etc).
3. Focus Topic.
 - a. This is a discussion or presentation about a technical topic. Leader can be you (the facilitator), guest presenters, other members of the group, the host farm, etc.
4. Sharing Situations and Experiences — go around the membership. Make sure everyone has a chance to talk.
 - a. What is the current feed/forage/grazing situation?
 - b. How is each farm prepared for winter/spring/summer/etc.?
 - c. Current projects?
 - d. Significant problems re feed/forage/etc.?
5. Current Market and Financial Situations.
6. Design & Conduct practical on-site trials — plot tests, fertility trials, parasite control, etc.
7. Announcements —
 - a. Upcoming events, news articles,
 - b. Updates about ongoing stories, etc. (e.g. new developments in the continuing BSE saga, etc.).

L. The Pasture Walk

1. The length is variable — depends on the host site, the weather, and the schedule for the rest of the meeting. Can last 30–120 minutes.
2. The pasture walk is only *part* of the group meeting, not the only reason for meeting.
3. During the pasture walk, keep people together. Don't allow subgroups to split off or lag behind for long. Make sure stragglers catch up with the main group. As the facilitator, you have the group's mandate to act as their "stockdog". Don't initiate any group discussions in the pasture until all members are caught up.
4. If appropriate, collect pasture samples to determine pasture mass. Use these numbers in the ensuing discussion.
5. End the pasture walk in enough time to get back to the barn area for the focus topic, further discussion, and announcements. Don't end the meeting at the end of the pasture walk without first going back to the barn or house.

M. Hosts and Meeting Sites

1. Rotate meetings among member farms.
2. This means that if a group contains 18 farms and rotates equally, it will take 1.5 years to come back to it for the next meeting.
3. There is no need to rotate equally. Use judgement. Take advantage of seasonal opportunities and specific requests.
4. If the membership comes from a wide geographical area, you might try alternating hosts back and forth across that area. This will help reduce perceptions of excessive driving.
5. Meetings are working events, not social gatherings.
 - a. No potlucks (except as noted below).
 - b. Start-time and end-time are fixed.
 - c. *Meetings must be worth the members' time.* Remember that members are paying money to be there. They are also giving up other activities to attend; they are spending time driving to the site; and they are making arrangements for someone else to do the chores at home.
 - d. Each meeting must be valuable to *everyone*.
 - e. But within this context, meetings can be socially very enjoyable events. This is something that evolves with time. Trust me.
6. Hosts should not feel the need to “entertain” the group. The hosts should not “clean the house or barn or rearrange things”. Emphasize this when you arrange for the host. Avoid the syndrome of “keeping up with the Jones’.” Although it’s OK for hosts to provide something easy like coffee and possibly cookies, be careful of anything more extensive. You don’t want members to become reluctant to host a meeting because they are shy about having the group visit their place.
7. Possible alternate sites for meetings (remember that these are still normal group meetings, not tours):
 - a. Other grazing operations — especially those that use intensive grazing practices.
 - b. University campuses or research stations.
 - c. Feed/Fertilizer plants.
 - d. Other commercial agricultural operations (pellet mills, feedstores, etc).
 - e. Seed companies — their offices, research farms, and variety plots.
 - f. Golf courses — to focus on turf-grass management.
 - g. Open-air zoos — how do they manage their forages with so many species of animals?
 - h. Equipment dealers.
 - i. Offices of government agencies.

8. If you are going to a non-member farm, ask the host in advance for soil tests and a simple farm map (hand-drawn is OK), showing fields, fencelines, water sources, buildings, etc.
9. Tours — arrange one-day or overnight trips to distant sites. A tour is a special event, maybe once each year or two. Arrange extra financing for your extra time.
10. Combined meetings — periodically, combine your group meeting with another producer study group.
11. An idea: reserve the December meeting as a “Holiday Potluck”. Encourage everyone to bring family and even friends to this meeting. (This is also a good time to invite potential members). Make it a nice party. No technical focus topic or invited speaker. No pasture walk or barn tour. Have lots of good food. Show slides — especially if you or one of the members had traveled during the year. Make announcements. Thank everyone for being part of the group and making this such a good year.

N. Guests & Guest Speakers

1. Guest Speakers
 - a. These are optional but if utilized occasionally, guest speakers are a nice variation in the routine.
 - b. Do not invite guest speakers for all meetings. Guest speakers change the dynamics of the group interaction.
 - c. Make sure that all arrangements are confirmed and unambiguous.
 - d. If guest speakers expect to get paid, then make sure that the group approves and that the payment arrangements are clear on both sides.
2. Other Guests (usually invited by members).
 - a. Usually OK, but always check with the group.
 - b. Some guests may become potential members. Keep track of their attendance.
 - c. Recognize that sensitive financial topics are often discussed in meetings. If outside guests are in attendance, apprise them of this situation. Otherwise do not invite outside guests to such meetings.
 - d. Refrain from inviting too many outside guests. Do not allow closed meetings to drift towards open meetings. Remember that members are paying for membership in a closed organization and that the privacy of this group is one of its unique characteristics and strengths.
 - e. Be careful with reporters and other people from the press. They are not necessarily your friends. Realize that they want a story. They have their jobs to do, and their goals may not benefit the group. Only allow reporters if it is advantageous to the group. Always ask all the members for their opinions before inviting the press.

0. Things to Bring To Meetings

1. Lots of Plastic Tote Boxes — can be obtained at any department store or home improvement store.
2. Handouts.
3. Box of reference books and notes.
4. Pasture Measuring tools — for determining pasture mass. Include a postal scale that weighs to the nearest 1 gram.
5. Soil Testing probe.
6. Submission Forms and Sample Bags for forage tests, soil tests, etc.
7. Rubber Boots.
8. Easel or tripod.
9. White Board or Flip Chart.
10. Box of presentation tools — dry erase markers and erasers, chalk, laser pointer.
11. Extension Cord.
12. Multi-plug Outlet Strip.
13. Box of extra clipboards and pens. Clipboards are for temporary use during the pasture walk. Put blank paper on each clipboard. Members will return the clipboards at the end of the meeting.
14. Box of Lending Library materials.
 - a. “The Lending Library” — You can compile of small library of documents related to forage-nutrition-management that can be made available to loan to members. In fact, group members can contribute their own documents to this collection. Everyone has publications that they don't use currently and would like to share. Shareable items could include books, pamphlets, notes, audiotapes, videotapes, CDs, DVDs, etc. This library should be under your control and can be used for multiple groups. A simple library card system can help you keep track of who has borrowed what when.
15. A pickup truck with a cap is very useful.

P. Communications – Announcements

1. Prior to each meeting, routinely send *two* communications to all members: (1) a Preliminary Announcement, and (2) The Formal Meeting Announcement.
2. Within 4 days *after* each meeting, send a *Preliminary Announcement* email to members. This email will contain two things:
 - a. “mark your calendar for our next meeting on _____”, and also
 - b. a brief summary of the topics discussed and other activities at the previous meeting.
3. The *Formal Meeting Announcement* — should be sent to members 7-10 days prior to the meeting. I send an email to everyone who has Internet access. I snail mail a postcard to those members who do not have Internet access.
4. Email is convenient and cost-effective, *but email only works for people who rely on it daily*. Some folks check their email account only sporadically, if at all. You should send announcement postcards to these folks.
5. Also, always be alert for members who may be having trouble with their Internet connection. This happens intermittently to many people, especially in rural areas. Those folks should also receive a mailed postcard, as if they had no functioning connection.
6. As appropriate, send additional “heads-up” notices to members about important topics or announcements. These go *only* to members – either as direct communications (email or phone) or by closed email announcement lists. As their facilitator, you are always trying to serve members in their best interests.
7. Remember — you *must* successfully communicate with the members. This is not an option. *It's your job to ensure that they receive your communications successfully*. It is *not* their job to do that work for you, nor is it their fault if they don't get the material.
8. An additional possibility for electronic communications is to set up a closed listserver for members. Sometimes, a member may have the Internet skills and interest to do this. For example, Yahoo allows groups to set up private email distribution lists. If you are not sure what I am talking about, then don't do it.
 - a. I would suggest that you *don't* assign this responsibility to a member's teenage kid who is a computer whiz. In the long run, doing this will probably cause more problems than it solves.

Q. Records & Archives

1. Periodically compile a *Membership List* and distribute it to all members. Always include the compilation date (month & year). Include all contact information. Keep this list current. Revise annually or more often — particularly important in today's world because phone numbers and email addresses seem to change frequently.

2. In your email software, create an “alias” (“nickname”, or whatever your software calls it) that includes all current members. Create a second alias for the folks who should receive the cc of these messages.
3. Maintain attendance records.
4. Inspect and analyze these attendance records. Observe who is attending and who is not. Ascertain the reasons why some folks are missing meetings. Call those folks and chat about it. The concern expressed in a personal phone call may often help keep a member in the group. Adjust the schedule or topics or meeting sites to encourage attendance. Work closely with members about this.
5. I keep a database that contains a record of every group meeting — who, what, where, and when. Each record also includes attendance, guests, topics discussed, meeting activities, group decisions, and things that I promised or need to do.

R. Finding New Members, Bringing Them In

1. Pre-requisites — new members should have basic knowledge of forages, grazing, possibly nutrition. They can have obtained this knowledge through course-work, acknowledged experience, professional position, etc.
2. Be careful about allowing novice beginners to become members. They cannot add significantly to the discussion, but they can drag it down. Remember that a study group is designed to build on the considerable knowledge of members, and members are paying significant amounts of money to participate in these discussions. Beginners tend to ask lots of basic questions, which require answers about basic principles. This activity takes time away from more productive discussions, can be boring to other members, and ultimately, is detrimental to the group.
3. Potential members can come from other courses, recommended producers, professional staff (feed, seed, & fertilizer dealers, veterinary clinics, government agencies, etc).
4. Invite guests for 1–3 meetings. No payment, no fees, no obligation. This is a try-out period — for both sides.
5. A new membership is a sensitive situation. The decisions must be made on *both* sides.
6. Current group members *must* be protected. Their wishes take precedence.
7. When a new member officially joins the group:
 - a. If this occurs at the beginning of a 6-month period, membership dues are paid in full.
 - b. If this occurs during the middle of a 6-month period, membership dues are pro-rated for that period.
8. During the initial year for a new member, some extra personal contact by facilitator is good. Encourages them to attend.

S. Acting as a Technical Consultant

1. You are only being paid to be the group's facilitator, not a free consultant to every member, although the line between these roles is fluid and inexact. Significant additional individual services should require additional payments. If an individual member wants you to work extensively on their individual problem, then you should charge accordingly. But use judgement. I don't worry about simple phone calls or short technical conversations. I consider those as part of my service and also as membership perks for being in the group.
2. Know your technical field. Know what you know, what you don't know, and where you can look things up.
3. If you don't know something, say so. You will not lose credibility. But people will know if you try to bluff your way through an answer. *That's* when you lose credibility. And remember, you will see them again soon.
4. If you promise to do something, *make sure that you do it*. Keep a record of your promises.
5. Answers come in all flavors. Don't hesitate to put members in touch with other members or other producers who may have good answers. Answers don't only come from official university textbooks.
6. Try to understand what people *really* need, not just what they ask. Look beyond the words. See a situation in its entire context. After all, if the answer was easy, why would they be asking you?
7. Know each member well and each member's operation fluently. Group members are clients. Your ability to provide good advice depends on your knowledge of the complex interlocking aspects of their operation and your skill in weighing alternatives that can best apply to their unique situation.

T. Involvement by Government Staff

1. Extension Service.
 - a. This can be a sensitive topic because there can be local issues of turf, history, personalities, and leadership. Inviting a local County Extension Agent to meetings should *not* be automatic. Find out the true opinions of group members before inviting the Extension Agent.
 - b. Some local Extension Agents may feel that producer education is the exclusive bailiwick of the Extension Service and may resent private facilitators or the establishment of independent producer study groups. This protectiveness can manifest itself in many ways, including ways that make group members uncomfortable. Be aware of this potential conflict.
 - c. If a local Extension Agent is invited, he should be included as an *ex officio* attendee (i.e. *gratis*, no membership dues required).

- d. If a local Extension Agent attends meetings, it should be in the role of an equal member or a guest, not as a second facilitator. The group is paying only one facilitator — *you*. If necessary, clarify this with the Agent.
 - e. Monitor the dynamics in the room when a local Extension Agent is present. The group meeting should not evolve into a typical Extension workshop just because the Extension Agent is in the room. There may be a drift towards that type of dynamic. Watch the flow of information and discussion. Maintain an interactive flow of information and multi-directional discussion among all members, and watch for members who begin to refrain from adding their comments. The traditional social dynamics of working with the Extension Service is deeply ingrained in our agricultural culture, and the one-way, top-down approach to information exchange is antithetical to the interactive sharing that is a strength and trademark of producer study groups.
 - f. Some members may want the local Extension Agent to attend meetings to learn from the most progressive producers, so that the Agent can help spread this information to other producers in the area. This is actually a valuable service that the study group can provide to the general agricultural community. Make sure that the Agent is aware of the wishes of the group.
2. NRCS, FSA, DEQ, Department of Ag, etc.
 - a. Recognize that some employees of these government agencies may be involved in regulatory programs that have compliance implications. Discussions during group meetings often focus on private information about member operations. Be sensitive that group meetings can sometimes reveal potentially touchy situations that may be in violation of regulations. This can be a very awkward situation. How will government employees treat these situations? Will they be *required* to report or act on violations observed during group meetings? As the facilitator, you *must* address this issue *before* these folks begin to attend meetings. If one or more group members distrusts a government person, then that person cannot be invited to meetings.
 - b. This situation can become particularly muddy when a government official also owns a farm and wants to join the group in the name of their farm. Work out the solution on a case-by-case basis.
 3. Other Government Personnel.
 - a. Case-by-case basis.

U. Closing Comments

A private, fee-based producer study group is a special thing. It's a rewarding, exciting experience for the members and for the facilitator, and it's also financially sustainable. New Zealanders, who have been organizing these groups for more than 20 years, have demonstrated that private, fee-based producer groups are a very effective method for transferring information between farmers and improving profitability. In Oregon, where these groups have been functioning for ten years, we have seen the same results.

But the facilitator is the key. A good facilitator helps members help themselves. The success of a producer study group depends on many things, but one of the most critical is the facilitator. A good facilitator will give the group an excellent chance to thrive, while a poor facilitator will virtually guarantee that the group will struggle and that members will have a hard time.

So become a good facilitator — much depends on it. Good luck!

Woody Lane
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