

Sustaining Family Farming Through Mentoring: A Toolkit for National Family Farm Coalition Members

January 2011

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Summary:

Looking at the challenges facing America's aging agricultural base, National Family Farm Coalition's (NFFC) Local Foods Subcommittee requested the creation of a report focusing on how NFFC members can connect with mentoring opportunities targeted at supporting young farmers. This toolkit is the product of a five-month long research project that included interviewing staff of 21 organizations that coordinate or facilitate mentoring opportunities for beginning farmers across the U.S. *Sustaining Family Farming Through Mentoring* includes: an introduction to beginning farmer issues; a research project that explored the strategies and challenges of mentoring organizations; a compilation of resources for experienced farmers interested in becoming mentors; and a directory of mentoring organizations. This toolkit seeks to connect NFFC members with mentoring organizations in their area as well as to deepen understanding of the role of mentoring organizations in the local food movement.

A few major highlights of the toolkit:

- Beginning farmers face significant barriers to entering agriculture including: access to affordable land; high start-ups costs; market access; risk management; health insurance; and lack of experience.
- There has been an upsurge in mentoring programs due to the creation of the Beginning Farmer and Rancher Development Grant in the 2008 Farm Bill as well as an increased commitment to beginning farmer issues by state governments and funders.
- Surveyed mentoring organizations cited four key successful strategies for managing a successful mentoring program: providing incentives for mentors; a thorough application process; building local networks; and flexibility.
- Surveyed mentoring organizations cited five major challenges confronting their program: funding; finding an appropriate match; legal issues; proprietary knowledge; and generational gaps in communication styles.
- 18 out of 21 respondents felt that their mentoring program had helped sustain family farming.

Mentoring programs play an important role in strengthening the local foods movement by bringing new, diverse producers into agriculture. NFFC members can further support the local foods movement by partnering with mentoring organizations in their regions and encouraging local producers to participate in mentoring programs. In addition supporting and participating in mentoring organizations, NFFC members should continue to advocate for policies that help beginning farmers build equity, provide a safety net, and increase market access through supporting the local foods movement.

Table of Contents

Introduction

The Purpose of this Toolkit.....	6
----------------------------------	---

Section 1: Beginning Farmers

Aging U.S. Farmers.....	6
Definition of Beginning Farmers and Ranchers.....	6
Who are Beginning Farmers and What Role Do They Play in U.S. Agriculture.....	7
Challenges Facing Beginning Farmers.....	7
What are the Federal Programs that Support Beginning Farmers?.....	9

Section 2: Mentoring Research Project

Objective of Study.....	10
Methodology.....	10
Analysis.....	12
Discussion.....	21
Key Strategies.....	21
Key Challenges.....	22
The Role of Mentoring Programs in Sustaining Family Farming.....	24
Conclusion.....	25

Appendix 1.....	26
-----------------	----

Appendix 2.....	27
-----------------	----

Section 3: Mentor Tools..... 28

Conceptualizing Mentoring on Your Farm.....	28
Is an Internship Right for You?.....	29
Motivations for Becoming an On-Farm Mentor.....	32
Farming Knowledge and Skills Self-Evaluation Exercises.....	34
Training Facilities Evaluation.....	37
Residential Facilities Evaluation.....	39
Designing Your Mentoring Program.....	40
Developing a Farm Policy.....	42
7 Tips for Setting Up an On-Farm Internship.....	43
Adding Value to Your Farm Internship: A Checklist.....	46
Recruiting and Selecting Trainees.....	47
Promoting Your Training Program.....	49
Selecting Your Interns.....	51
Trainee Recruitment and Selection.....	53
Teaching Tools.....	52
One on One Teaching.....	52
Mentoring Knowledge and Skills Self-Evaluation Exercises.....	55
Teaching Knowledge and Skills Self-Evaluation Exercises.....	62
Adult Learning Styles.....	

Learning Styles-Modality Preference Inventory.....	61
Evaluation Tools.....	65
The Evaluation Process.....	65
Training Program Evaluation.....	69
Legal Considerations.....	70
Labor on the Farm.....	70
Addressing Liability Insurance Concerns.....	74
The Business End of On-Farm Mentoring.....	76
Are your Employees Performing “Agricultural” Work?.....	103
The FLSA 500 Man-Day Exemption.....	104
FLSA Minimum Wage and Overtime Exemptions.....	106
FLSA Recordkeeping Requirements.....	107
The FLSA Child Labor Exemption.....	108
MSAWPA Regulations.....	109
OSHA Agricultural Exemptions.....	110
OSHA Health Compliance for Agricultural Employees.....	111
OSHA General Industry Compliance.....	114
OSHA Additional Topic Compliance.....	115
 Section 4: Mentoring Program Directory.....	 120
References.....	128

Acknowledgments

Sustaining Family Farming through Mentoring is the product of the vision, guidance, and support of many individuals. Firstly, I would like to acknowledge Eric Hoffman, the Bill Emerson National Hunger Fellow placed with the National Family Farm Coalition (NFFC) in 2009. His preliminary work set the stage for this toolkit, identifying mentoring, as a key issue for NFFC members to integrate into their work within the local foods movement. I would also like to thank the Local Foods Committee of NFFC for providing the vision for this toolkit and offering insight and direction as this project evolved.

I would like to thank Lisa Griffith for her unwavering willingness to brainstorm, review, and offer constructive insight for this project. I would also like to thank my many great reviewers of this toolkit: Judy Gillan, Bob St. Peter, and Jeff Eschemeyer. Additionally, I would like to acknowledge Kathy Ozer, the Executive Director of NFFC, for her support and direction around this project,

I would like to thank all of the innovative and committed organizations that support mentoring initiatives, formally and informally that participated in this research project. I would like to extend special thanks to the Agriculture and Land-Based Education Association (ALBA) for their photos and feedback. Siva Sureshwaran, provided information about the recipients of the Beginning Farmer and Rancher Development Grants, which greatly broadened the scope of this research. I would also like to thank Mary Ahearn with the Economic Research Service of the USDA for her willingness to discuss beginning farmer statistics and research.

The Congressional Hunger Center made this toolkit possible through the support that they provided me as a Bill Emerson National Hunger Fellow.

Lastly, I would like to thank the organizations who have been committed to creating resources around mentoring and On-Farm education for many years and were willing to share those resources and knowledge through this toolkit: the Northeast Organic Farming Association of New York, ATTRA-National Sustainable Agriculture Information Service, the New England Small Farm Institute, the Washington State Department of Agriculture, and Cultivating Success.

Introduction: The Purpose of this Toolkit

This toolkit was designed at the request of the Local Foods Committee of the National Family Farm Coalition (NFFC). It seeks to continue exploring issues identified in the report created by Eric Hoffman, a previous Emerson National Hunger Fellow, who was placed with NFFC in the spring of 2009. His report, *Barriers to Local Food Marketing: A Survey of National Family Farm Coalition Members*, identified mentoring programs as a key issue area for NFFC members in their efforts to support the local food movement.

In *Barriers to Local Food Marketing*, a key conclusion was the limited access of many NFFC members to mentoring programs in their communities. (See Figure 1.) This toolkit stems from the recommendations made in *Barriers to Local Food Marketing* and seeks to explore the nature of mentoring programs nationally and their common strategies and challenges. Section 1 presents an introduction to beginning farmer issues. Section 2 presents the findings of research conducted by NFFC that included a survey of a diverse range of mentoring programs. Section 3 provides tools for experienced farmers interested in mentoring on their farms. Section 4 includes a directory of mentoring programs that NFFC members can use to find mentoring programs in their region that can support their farmer members.

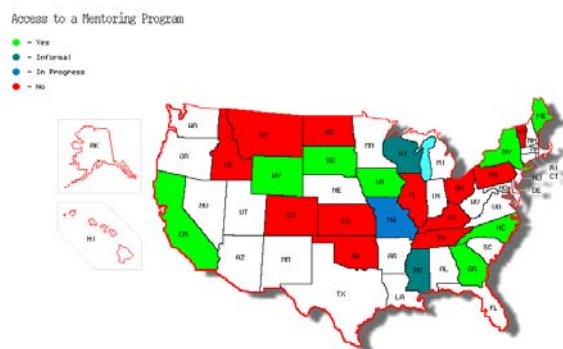


Figure 1: The access of NFFC members to mentoring programs in their community. (Hoffman, 2009)

Section 1: Beginning Farmers

Aging U.S. Farmers

The face of family farming in the United States is aging. As land values rise, price volatility continues to intensify, and the price of inputs and equipment soar, the barriers preventing young farmers from entering agriculture are becoming increasingly insurmountable. In 1970 the average age of a farmer was 50 years old. As of 2007, the average age of a farmer is 57 with 25% of all U.S. farmers over the age of 65¹. This upsurge in the average age of farmers reflects the changing nature of agriculture in which aging farmers are able to continue farming past retirement by renting out land, hiring additional labor, and placing land in conservation programs. These factors, however, do not reflect many of the growing challenges facing beginning farmers, preventing them from becoming successful agricultural producers and the U.S. agricultural base.

Definition of Beginning Farmers and Ranchers

Beginning farmers and ranchers, as defined by the United States Department of Agriculture (USDA), are farm or ranch operators who have operated a farm or ranch for ten years or less. The 10-year rule applies to all operators within a farm or ranch. This definition does not differentiate between beginning farmers and ranchers who are providing for their household residence and those whose farm and ranch operations are commercial enterprises.

The USDA definition of beginning farmers and ranchers is critical, because it delineates who is and is not a beginning farmers and ranchers and therefore who is or is not eligible for programs targeted toward beginning farmers and ranchers. In some ways, the USDA definition is very inclusive in that it incorporates beginning farm and ranch operators whose operations are exclusively personal and not commercial. This definition, however, does not appreciate the

¹ Ahern, M. and Newton D. *Beginning Farmers and Ranchers*. USDA. May 2009.

sizable body of individuals who are not yet principal operators of farms and ranches, but are exploring agriculture as a potential livelihood. These “explorers” may be interns, apprentices or farm workers on established farmers or ranchers. The USDA definition does not include these individuals and are therefore currently ineligible for USDA beginning farmer programs. The limited USDA beginning farmer definition can inhibit the agencies ability to provide services and support for these early “explorers” as they make the resource intensive and difficult transition to managing their own operations.



Photo Taken by Troy Freund

Who are beginning farmers and what role do they play in U.S. Agriculture?

Beginning farmers are the principal operators on 22% of U.S. farms, but only account for 10% of the total agricultural production and cultivate less than 10% of total agricultural land. The characteristics of beginning farms explain why beginning farmers operate one-fifth of U.S. farms but only account for one-tenth of its agricultural production. Farms managed by beginning farmers are typically smaller with an average farm size of 174 acres as compared to the average size of an established farm, which is 461 acres. Beginning farmers tend to rely more heavily on off-farm income to supplement on-farm earnings. In actuality, the majority of beginning farmers lost money on their farm operations in

2007. Established farmers and beginning farmers are equally likely to own land, but beginning farmers, generally, carry a heavier debt load associated with land ownership. In addition to this higher debt load, the net worth of farms owned by beginning farmers is significantly lower than the average worth of established farms at \$428,894 as compared to \$840,125.

Beginning farmers are also more likely to be female, non-white or Hispanic than established farmers. This demographic difference between established and beginning farmers means that many beginning farmers are more likely to face discrimination and/or marginalization. Additionally, not all beginning farmers are young and choosing farming as their first career. Many beginning farmers are entering agriculture later in life, becoming the primary operator of their family’s farm after other careers, or farming as a transition to retirement. It is important to appreciate this diversity in age when designing programs that seek to support beginning farmers.

Challenges Facing Beginning Farmers

Beginning farmers face a number of significant challenges when starting an enterprise: access to affordable land; high start-ups costs; market access; risk management; health insurance; and lack of experience. The availability of affordable land is variable by region with less access to affordable land near urban centers. Urbanization, which inflates land prices, can disproportionately harm beginning farmers, because beginning farmers are more reliant on off-farm income and specialized markets which are more available in urban areas. Additionally, beginning farmers often struggle to attain appropriate credit to purchase land and/or equipment. Many creditors require three years of production data as well as asset minimums that can be prohibitive for beginning farmers. The USDA has attempted to address this credit access issue through various programs, which will be discussed in the next section.

The transition from part-time to full-time farmer or rancher for many beginning producers

can be very difficult due to market access issues and difficulties reaching a scale of production large enough to provide sufficient household income. Many beginning farmers choose to market their goods in specialized, higher value markets. These specialized markets can offer beginning farmers a premium for their product but also require a considerable investment of time by the producer and can be inconsistent or inaccessible, depending on their location.

Risk management is essential to insuring the success of any of farming enterprise. However, the risk management tools available within the U.S. do not sufficiently safeguard the type of farms generally managed by beginning farmers. The Federal government offers a number of programs that help farmers manage risk. These programs, which include disaster relief and crop insurance, often do not serve the specialized needs of many beginning farmers. The crop insurance program will only insure crops based on their commodity prices, not appreciating the premium price that many beginning farmers receive for their goods in a specialized market due to organic certification, direct marketing, or other value-adding strategies. Additionally these programs cover a limited number of crops, meaning that less traditional products are not even recognized within the scope of risk management through USDA. These deficiencies in the risk management programs do not exclusively harm beginning farmers, but due to the types of farms typically managed by beginning farmers this is a significant challenge for this type of producer. Without a set of robust risk management programs or mechanisms such as reserves to help farmers self-insure many beginning farmers are in jeopardy after one or two bad seasons.

Many beginning farm and ranching enterprises are in precarious positions in relation to risk management, market access, and credit. This vulnerability is reflected in the survival rate of farms that were started during the period of 1978-1982; by 1997 only 19% of these farms were

still in operation². Agriculture is an inherently risky enterprise, and without fair prices, market access and sufficient safety nets in place to support beginning farmers the success of these new producers will be limited.

Farming and ranching is not just financially risky but also risky for the wellbeing of the ranchers and farmers who produce food and fiber. The Bureau of Labor Statistics ranked farming and ranching as the fifth most dangerous occupation with 293 occupational deaths in 2007³. This statistic does not appreciate the countless non-fatal injuries that farmers and ranchers experience every year as well as the deaths which are not appropriately attributed. If a farmer or rancher does not have health insurance, a single accident can lead to crushing medical debt and bankruptcy. The issue of no health coverage or inadequate coverage is relevant to established and beginning farmers. In many farming and ranching families an off-farm job within the family provides the health insurance coverage. The surge of lay-offs in 2008 and 2009 left many farm and ranch families without coverage and vulnerable to accumulating significant medical debt, jeopardizing their operations. Due to the reliance of beginning farmers on off-farm income, the recent unemployment trends disproportionately impact these producers.

Increasingly beginning farmers are coming from non-farm backgrounds. These beginning farmers did not have the opportunity to learn about production techniques from their families and therefore have to look to alternative educational spaces for instruction. Additionally, many beginning farmers who are coming from farming backgrounds, are interested in pursuing locally focused or sustainable farming operations, which may be very different from the farming system they grew up with. Numerous apprenticeship and mentoring programs have arisen nationally to support both of these types of beginning farmers.

² Ahern, M. and Newton D. *Beginning Farmers and Ranchers*. USDA. May 2009.

³ Bureau of Labor Statistics. *Census of Fatal Occupational Injuries*. 2007.

This toolkit focuses on exploring how these mentoring programs can support beginning farmers and experienced farmers as mentors.



Photo Taken by Troy Freund

What are the federal programs that support beginning farmers?

Beginning farmers participate in government programs at a lower rate than established farmers. Only one-fourth of beginning farmers participate in government programs as compared to 42% of established farmers. As a way to incorporate beginning farmers into more federal programs and support these producers legislators have developed a number of programs that focus on beginning farmers. The majority of assistance offered to beginning farmers comes in the form of credit. The 1992 Agriculture Credit Improvement Act was the first legislation that set up a designated amount of money specifically for beginning farmers. The amount of money allocated for loans through the Farm Service Agency (FSA) and Farm Credit System (FCS) to beginning farmers has grown since 1992. FSA reserves 50% of direct operating loans for beginning farmers and up to 70% of direct farm ownership loans until September 1st of each year⁴. These programs have made credit more accessible for some beginning farmers, but as discussed

earlier the needs of beginning farmer extend well beyond just credit access.

The 2008 Farm Bill had a number of provisions that allocated funds within existing programs to focus on beginning farmers. 10% of grant funds in the value-added market development activities program were designated for beginning farmers and ranchers. Additionally, the Environmental Quality Incentive Program and Conservation Stewardship Program have lower cost share requirements for beginning farmers and ranchers. The most targeted program authorized and subsequently funded in the 2008 Farm Bill to support new farmers and ranchers is the Beginning Farmer and Rancher Development Grant. This program has an annual appropriation of approximately 18 million dollars and funds collaborative, State, tribal, local, or regionally-based networks or partnerships of public or private entities to develop and implement programs which support beginning farmers. The impact of these funded projects will be evaluated as these programs are implemented through 2011.

Within the 2008 Farm Bill a Beginning Farmer and Rancher Individual Development Account (IDA) program was authorized. This program, if funded would provide saving matching for beginning farmers and ranchers.

These efforts, though small, indicate that the issue of beginning farmers has garnered national attention, though the extent to which these programs truly support beginning farmers is unclear.



Photo Taken by Troy Freund

⁴ Ahern, M. and Newton D. *Beginning Farmers and Ranchers*. USDA. May 2009.

Section 2: Mentoring Research Project

Objective of Study

There has been an acknowledgement at the federal, state, and community level that supporting beginning farmers is an essential component to sustaining family farming within the U.S. Increasingly beginning farmers do not have farming backgrounds and therefore do not have access to the knowledge and support that being raised in a farming family provides. In response to this need, a range of mentoring programs that focus on connecting beginning farmers with mentors or educational resources around production and/or financial management have arisen. This upsurge in mentoring programs includes a diversity of programmatic formats, but all programs share the mission of increasing the resiliency and viability of beginning farmers within their region. This research project focused on interviewing a range of mentoring programs and through these conversations identifying the successful strategies as well as common challenges for these programs. By identifying these successful strategies and challenges, a broader discussion surrounding the shortcomings and strengths of these types of programs in holistically supporting beginning farmers can be explored.



ALBA Photo Archive

Methodology

The National Family Farm Coalition (NFFC) examined these central issues through the collection and analysis for twenty-one interviews with organizations that support beginning farmers through mentoring or training. NFFC collected these interviews in the spring of 2010. The interviewed groups were identified through three avenues: a beginning farmer resource directory compiled by the Local Foods Committee of NFFC; the recipients of the 2009 Beginning Farmer and Rancher Development Grant through the USDA; and referrals from interviewed organizations. A complete list of interviewees and their respective affiliations can be found in Appendix 1. The groups interviewed represent a diverse range of mentoring programs in 17 states. Some organizations represent regional or national memberships that support mentoring in areas outside of their community, region, or state. Figure 2 maps the location of each organization's main office. Organizations that promote fishing apprenticeships were also contacted as well as more traditional youth farming organizations such as Future Farmers of America and Farm Bureau, but none were able to participate. All interviews were conducted by phone with the exception of two questionnaires that were completed electronically. All interviewees were asked the same set of sixteen questions (see Appendix 2).

Within the scope of this study, aspiring farmers who are seeking mentors are referred to as trainees. Intern, apprentice, and beginning farmer, as terms, all have legal definitions that can vary by state and can carry different expectations and definition depending on the mentor. Therefore, in this study, the term trainee is used in an attempt to appreciate the diverse nature of mentor-trainee relationships.

NFFC analyzed these interviews by coding interview transcripts according to the following themes: years since program began;

successful strategies; challenges; number of participating mentors; number of participating beginning farmers; success of partnerships; duration of trainee/mentor relationships; mentor outreach strategies; beginning farmer outreach strategies; resources needed for program; follow-up strategies; and ways to strengthen the program. NFFC examined the aggregated notes, identifying themes and then broke down these themes by type of mentoring program (i.e. on-

site mentor matching program). NFFC then identified recurring themes by type of mentorship program and generated categorical graphs and charts that display the number of respondents expressing specific opinions about key themes. Using these themes, NFFC looked for commonalities, differences, and relationships between or among types of mentoring program in order to formulate our analysis.

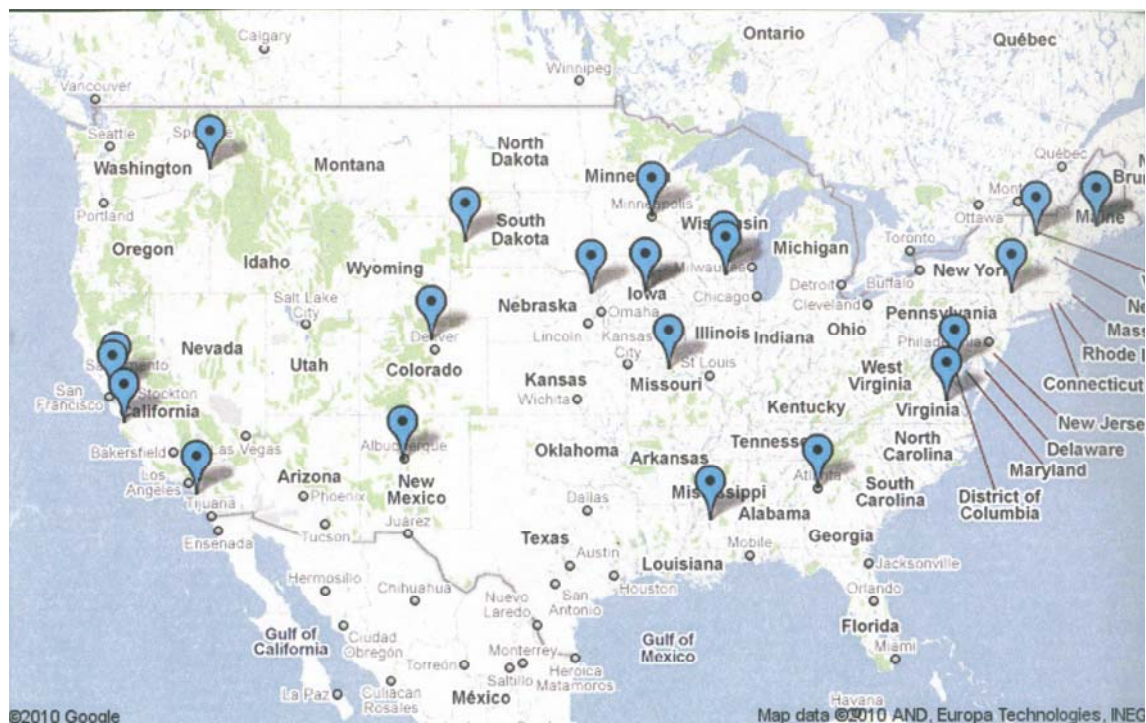


Figure 2: *The Headquarters of the Mentoring Programs Interviewed*

Analysis

Question 1: Length of Time Organization has Worked on Mentoring:

How long has your organization been working on farming/fishing mentorship?

The mentoring programs interviewed represent a wide range of experience. Many of the organizations who have been administering mentoring programs for less than five years are beneficiaries of the Beginning Farmer and Rancher Development grants which were awarded in 2009 by the USDA. The concentration of mentoring programs that have been in operation for less than five years reflects the growing interest in beginning farmer issues by funders and advocates.

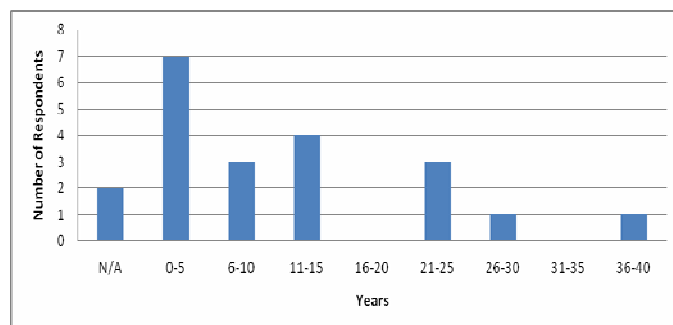


Figure 3: Length of Time Organizations have been Working in Mentorship

Question 2: Strategies Used by Organizations to Connect Trainees with Experienced Farmers:

What strategies does your organization use to connect beginning farmers/fishers to experienced ones?

Within this study a wide range of programs were included, many of which do not fit under the typical umbrella of mentoring programs. Figure 3 below displays a breakdown of the types of mentoring programs included in this study. Broad organization categories were used: mentor match programs; formal education programs; land transition programs; and organizing initiatives. Under each of these broad categories, more

descriptive sub-groups were created. The broad categories and respective sub-groups will be described below.

“Mentor Match Programs” are the most straightforward, direct mentoring programs that facilitate one on one mentoring for beginning farmers or ranchers with experienced farmers or ranchers. In formal programs organizations actively gather applications from mentors and trainee, facilitate matchmaking, and support both the mentor and trainee during the duration of the program. In informal mentor match programs mentors are publicly listed and trainees are responsible for connecting with potential mentors. Both informal and formal programs can offer on-site mentoring, in which trainees work with mentors on their farms, often living on the farm as well. Off-site mentoring occurs when the trainee already manages his or her own farm and is mentored through intermittent farm visits, phone consultations and social gatherings. The final sub-category of mentor match programs includes mixed programs which incorporate mentoring and coursework or provide various venues for beginning and experienced farmers to network and form mentoring relationships. These programs often have a number of components that incorporate strategies, such as mentor listings, conferences, field days, and on-line organizing to connect and match mentors and trainees informally and formally.

“Land Transition Programs” are similar to mentor matching programs in that they link experienced farmers with beginning farmers. In land transition programs the mentorship relationship tends to be longer term and is coupled with the legal transfer of land and equipment to the beginning farmer. These programs actively match retiring and beginning farmers and support these parties as they set up legal, binding agreements that allow for beginning farmers to eventually buy the land from the experienced farmer after or during prolonged mentoring. The focus of these programs is on transitioning land

from experienced farmers to beginning farmers but there is also a significant mentorship component. “Self-selection” land transition programs do not coordinate or support matches. These programs provide a listing of farmers interested in retiring and beginning farmers, and rely on people within the database to self-select and make arrangements on their own.

Formal Education programs are primarily classes or training programs that incorporate mentoring. Incubator farm programs provide beginning farmers land and training on managing a farm. These programs also help farmers with initial land access and equipment barriers. Mentoring within incubator programs is often facilitated through field days, farmers leading workshops, and informal networking. Mentoring is not the focus, but is an integral component of these programs. The more traditional form of formal education programs are classes held off-farm. This coursework provides essential information to farmers around production techniques and financial management. These programs are quite common, but those included in this study were chosen because they strive to provide opportunities for beginning farmers to develop mentoring relationships with farmer presenters and through informal networking.

The final type of mentoring programs included in this study was organizing initiatives that work across communities to strengthen networks between and among beginning and experienced farmers. These organizations encourage mentoring and the creation of supportive networks through conferences, leadership development, and the use of innovative organizing tools.

Mentor Matching Programs			12
	<i>Formal/On-site</i>	2	
	<i>Formal/Off-site</i>	3	
	<i>Informal/On-site</i>	1	
	<i>Informal/Off-site</i>	2	
	<i>Mixed</i>	5	
Land Transition			3
	<i>Formal Matching</i>	1	
	<i>Self-Selection</i>	2	
Formal Education			4
	<i>Incubator Farm</i>	2	
	<i>Off-site classes</i>	2	
Organizing Initiatives			2
		Total:	21

Chart 1: Types of Programs Surveyed

Question 3: Most Successful Strategies used by Organizations that Connect Trainees with Experienced Farmers: *3. Have these strategies proven successful? If so, what seems to work best?*

Below are the strategies identified by respondents as most effective and essential to their programs.

Successful Strategy	Number of Responses
Create Opportunities for Informal Networking	8
Intensive Application Process	5
Hold Conference	5
Strict Guidelines of Mentee Eligibility	4
Mentors Select Mentees	4
Provide On-line Resources	4
Provide On-line Listing of All Mentors	3
Pay Mentors	3
Farm Field Days	3
Peer to Peer Learning	3
Farmer Steering Committee	3
On-line Organizing	3
Leadership Development	2
Combine Classes and Mentoring	2
Using Existing Networks to Identify Mentors	2
Hold Retreat	2
Marketing Assistance	1
Diversity Among Students	1
Media: Radio, Movie, etc.	1
Create Networks by Enterprise	1
Using Legal Tools to Clarify Expectations	1
Room and Board for Trainee	1
Farm Visits by Staff	1
Build Community Networks through Mentor Program	1

Chart 2: *Key Strategies Identified*

Question 4: Key Challenges Faced by Organizations that Connect Beginning Farmers with Experienced Farmers: *What have been the key challenges in connecting mentors and mentees?*

Below are the key challenges facing mentoring programs as identified by respondents. Responses from question 11, which asked about the major obstacles facing mentoring programs were merged into this data set.



ALBA Photo Archives

Challenge	Number of Responses
Difficulty in Making Appropriate Matches	6
Limited Resources in Organization	4
Differing Expectations Between Mentors and Trainees	4
Heavy Fundraising Burden	4
Distance Between Mentors and Mentees	3
Low Mentee Commitment	3
Mentors Proprietary with Knowledge	3
Limited Time	3
Legal Issues	3
Recruiting Mentors	3
Incentivizing Mentoring for Mentors	2
No Quality Control for Mentoring	2
Limited Resources for Mentoring on Farms	2
Holding Mentors Accountable if They are Not Being Paid	2
Difficulty Evaluating Success	2
Lack of Land Access for Trainee	2
Language and Cultural Barriers	2
High Costs of Organization Owning Land and Equipment	2
Large Amount of Staff Time Needed	2
Transportation of Trainees	1
Circumstances can Change During Long-Term Transfers	1
Generational Gaps around Technology and Communication	1
Trainees have Trouble Reaching Out	1
Working with Marginalized Farmers	1
Lack of Understanding around Beginning Farmer Issues	1
Trainees Isolated on Farm	1
Mentees Can't Relocate	1
High Turnover of Mentor	1

Chart 3: Key Challenges Identified

Question 5: Number of Mentors that have Participated in the Program: *How many established farmers have participated in your program as mentors?*

The ability of mentoring organizations to recruit, support and connect large volumes of mentors is dependent on the type of program that organization is running as well as the resources they have available to them. Below is a break out of the number of mentors involved in each program-by-program type. N.E. stands for not evaluated.

Type of Program	Experienced Farmers
Mentor Matching Programs	Per Year
	<i>Formal/On-site</i> 75/5
	<i>Formal/Off-site</i> 20/12/15
	<i>Informal/On-site</i> 1200
	<i>Informal/Off-site</i> 15/N.E.
	<i>Mixed</i> 7/5/5/N.E.
Land Transition	Total
	<i>Formal Matching</i> 200
	<i>Self-Selection</i> 200/125
Formal Education	Per Year
	<i>Incubator Farm</i> N/A
	<i>Off-site classes</i> 7/5
	Total
Organizing Initiatives	N.E./ 10

Chart 4: *Number of Experienced Farmers Participating in Program*

Question 6: Number of Trainees that have Participated in the Program: *How many beginning farmers have participated in your program as trainees or students?*

The ability of mentoring organizations to recruit, support and connect large volumes of beginning farmers is dependent on the type of program that organization is running as well as the resources they have available to them. Below is a break out of the number of beginning farmers involved in each program-by-program type. N.E. stands for not evaluated.

Type of Program	Beginning Farmers
Mentor Matching Programs	Per Year
	<i>Formal/On-site</i> 160/5
	<i>Formal/Off-site</i> 25/15/12
	<i>Informal/On-site</i> 9000
	<i>Informal/Off-site</i> 10/N.E.
	<i>Mixed</i> 5/10/7/N.E.
Land Transition	Total
	<i>Formal Matching</i> 200
	<i>Self-Selection</i> 239/125
Formal Education	Per Year
	<i>Incubator Farm</i> 30/N.E.
	<i>Off-site classes</i> 80/60
	Total
Organizing Initiatives	3000/18

Chart 5: *Number of Trainees Participating in Program*

Question 7: Success of Experienced Farmers and Beginning Farmer Partnership: *What has been the success rate of these partnerships?*

When asking respondents about the success rate of their program it became clear that the definition of success and the process for evaluating that success was dependent on the type of mentoring program as well as the individualized design of that program. For some informal, on-site mentoring programs success was defined as people using their mentor database and trainees and farmers forging mutually beneficial short-term relationships. This concept of success does not hinge on trainee's continued involvement or success in agriculture, but rather, on the success of the service provided directly by the organization. In contrast for land transition programs, success is often defined as the legal transfer of land and equipment from a retiring farmer to a new farmer. In some formal education programs, the distribution of knowledge and skills through programming and the creation of an informal network for young farmers equate success. Other mentoring programs measured success by the number of their graduates that entered agriculture and continue to farm.

Very few organizations tracked their graduates closely due to resource constraints. Therefore, often success was measured in short-term ways, such as graduation from a program, mentor and trainee perceptions of the mentor experience, and anecdotal feedback. Many of the programs that had connected beginning and experienced farmers for more than five years had additional metrics they used to measure success: alumni trainees becoming mentors; young farmers

being successful and active in the local agriculture community; and mentorships that transform into long-term relationships.

The diversity in responses to this question reflects the range of mentoring programs interviewed in this study and additionally captures the complexity associated with meaningfully defining and quantifying success.

Question 8: Family Farming being Sustained by Mentoring Programs: *Has this program helped family farms/fishing enterprises to continue?*

This question measured the perception of respondents around the role of their program in sustaining family farming. The vast majority of respondents felt that their program had sustained family farming.

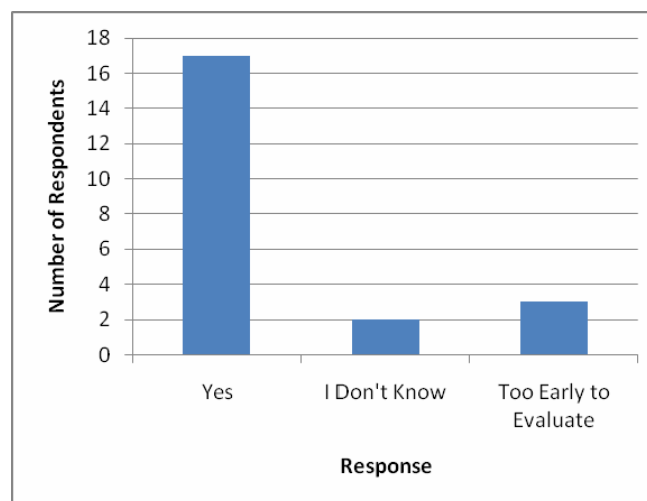


Figure 3: *How Has this Program Helped Sustain Family Farming?*

Question 9: The Duration of Experienced Farmer and Beginning Farmer Relationships:
On average, how sustained is the relationship between the farmers/fishermen and their students?

The duration of relationships between mentors and trainees was varying depending on the type of mentoring program. Mentor-match programs typically run the duration of one or two seasons. Informal mentor match programs typically are more variable, with every experienced farmer and trainee negotiating the terms of the mentorship. Additionally, all respondents from mentor match programs noted that mentorship relationships can be life-long depending on the compatibility of the trainee and mentor.

Land transition programs tended to have longer term mentor-trainee relationships. Due to the added complexity of transferring land and assets as well as establishing “sweat equity” these relationships can span fifteen years and are often formally laid out in legally binding agreements. This structured relationship can look like the five-five-five plan supported by the Beginning Farmer Center in Ames, Iowa. In this plan during the first five years the experienced farmer is the primary decision maker, during the next five years decisions are made cooperatively by experienced and beginning farmer, and within the last five years the beginning farmers is the primary decision maker. Less structured land transition programs leave it up to the experienced and beginning farmer to decide on the terms of their relationship, therefore the nature and duration of these relationships can be quite variable.

Organizing initiative programs are based on continual and sustained mentoring relationships between and among experienced and beginning farmers. Therefore, this question is not very applicable to these often informal networks of mentors and young farmers.

Within formal education programs, mentor and trainee relationships can span only the time of

the training (3 months to a year) or they can expand past the class into a more formal mentorship arrangement. Also, many of the education programs surveyed as part of this study did not have formal mentoring components, but strove to actively create spaces where informal mentor relationships or networking could occur. These informal relationships are widely variable in duration and are incorporated into evaluation through anecdotal information.

Question 10: Follow-up with Mentors and Trainees: Do you follow up with the mentors or mentees?

Follow-up strategies are an important component to evaluating a program and assessing its shortcomings and strengths. Many organizations, due to resource constraints, are not able to track alumni beyond an end-of-experience evaluation. Some organizations, especially those working in a tight knit community, are able to track alumni anecdotally.

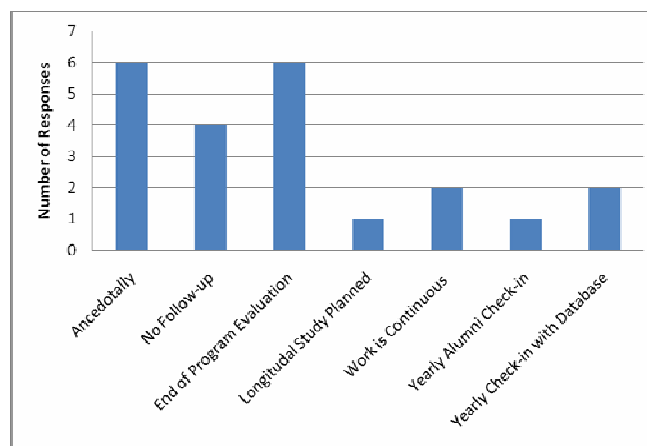


Figure 4: Follow-Up Strategy

Question 11: Key Obstacles Facing your Program: *What are the key obstacles in your program?*

Responses to this question were integrated into the fourth question of the survey around challenges facing mentoring programs. See above.

Question 12: Outreach to Experienced Farmers: *How do you reach out to experienced farmers/fishermen?*

The recruitment of experienced farmers as mentors is an essential element to all mentoring programs. The chart below chronicles the outreach strategies used by the respondents to recruit mentors.

Outreach Strategy	Number of Responses
Local Publications	5
Utilize Local Social Networks	5
Partner with Cooperative Extension	5
Conferences	4
Word of Mouth Among Farmers	3
Field Day Hosts	2
Workshop Presenters	3
Letters to Community Members	2
Table at Farmer Gatherings (i.e. trade shows)	2
Partner with Organic Associations	2
Offer Professional Development for Mentors	2
Partner with Organizations that Provide Technical Assistance	2
Newsletter	2
Partner with Research Institutions	2
Website	2
Radio	2
Listserv	1
Existing Relationships	1
Recruit Farming Award Winners	1
Farmer's Markets	1

Chart 6: Mentor Outreach Strategies

Question 13: Outreach to Trainees: *How do you reach out to interested trainees/students?*

The recruitment of beginning farmers is an essential element to all mentoring programs. Many respondents noted that recruiting beginning farmers was easier than recruiting beginning farmers, because beginning farmers are already seeking help as they begin exploring agriculture. The chart below chronicles the outreach strategies used by the respondents to recruit beginning farmers.

Outreach Strategy	Number of Responses
Website	9
Local Publications	9
Word of Mouth	8
Utilize Local Social Networks	5
Conference	4
Partners with Organizations that Provide Technical Assistance	3
Radio	4
Listserv	3
Newsletter	4
Partner with Cooperative Extension	3
Partner with NRCS	2
Partner with Organic Associations	2
Google Ad Words	2
Partner with University	2
Workshops	4
Outreach through Classes	1
Partner with Organizations that Provide Social Services	1
ATTRA Listing	1
Orion	1
Grassroots Network	1
Through our Hotline	1
Partner with Coops	1
Facebook	1
Blog	1

Chart 7: Trainee Outreach Strategies

Question 14: Resources Required for Mentoring Program: *What kinds of resources are necessary for a program like yours?*

The majority of programs reviewed are funded by grants through the Risk Management Agency, the Beginning Farmer and Rancher Development Grants, small private foundations, and/or local government agencies. This heavy reliance on grant funding was often supplemented by private donations, proceeds from events, elements of their training program (i.e. profits from the sale of products grown on a learning farm), organization membership fees, and apprenticeship or class fees. Organizations that own land and equipment for training have more upfront costs but also have potential for making additional profit. Across programs one of the largest expenses was supporting staff to organize the mentoring program. Most programs, especially programs where mentors and trainees are matched or classes and networking are facilitated, are time intensive for staff. Additionally, many organizations cited a conference where experienced and beginning farmers can gather and network as a key successful strategy, these events, however, tend to be expensive. The heavy reliance of many mentoring programs on grant funding often jeopardizes its long term sustainability.

Question 15: How to Strength or Expand Mentoring Program: *Are there any ways you would like to expand or strength your program? If so, how?*

This question sought to explore ways that respondents would like to strengthen their program to better support mentors and beginning farmers.

Ways to Strengthen Program	Number of Responses
Build More Sustainable Sources of Funding	4
More Training for Mentor and Trainees	3
More Outreach to Experienced Farmers	3
Provide More Support to Mentors and Trainees	3
Create a Training Center for Trainees	3
Better Tools for Evaluating Success	2
Be Able to Support and Match More Beginning Farmers	2
Better Use of Technology to Increase Reach of Program	2
Expand Geographical Reach	2
More Funding in Order to Compensate Mentors Better	2
Strengthen Local Partnerships	2
More Integration with USDA	1
Conduct Research that Makes the Program More Effective	1
Support a More Intensive Mentoring Experience	1
Provide Advocacy Training to Farmers	1
Do More to Build Trainee and Mentor Network	1

Chart 8: *Ways to Strengthen the Mentoring Program*

Discussion

Key Strategies

The mentoring programs analyzed in this research project utilize different structures and unique strategies that reflect the differing needs of their community, the availability of resources in their region, and the capacity of their community to support a mentoring program. Despite the diversity of mentoring programs a small set of common strategies arose across organizations: incentives for mentors; the thoroughness of the application process; network building; and flexibility.

The motivation for an experienced farmer to take on a trainee can be multi-fold. Perhaps that farmer had his or her own meaningful mentor relationship, or the farmer feels that bringing new farmers into agriculture is imperative and paramount. Whatever the reason for a farmer taking on a trainee, farmers are strapped for time, energy, and often financial resources. These basic realities frequently overshadow the initial interest of an experienced farmer to bring on a trainee. Many of the mentor programs interviewed identified creating an incentive for mentors as a key strategy for their program. In the case of the programs that offered off-site mentoring, in which the mentor advised beginning farmers who already have an enterprise, a mentor stipend was provided. Harriet Behar, with Midwest Organic and Sustainable Education Service (MOSES), commented that the payment of the mentor made it clear that the mentor's time was valued and also made the beginning farmers less hesitant to reach out and ask for guidance. In the case of many on-site mentoring programs, trainees can provide valuable labor in exchange for stipends and/or room and board. Properly incentivizing mentoring for experienced farmers increases accountability among mentors and also solidifies mentor and trainee connections. In more informal mentoring settings less concrete incentives can still facilitate meaningful

mentoring relationships. Working with experienced farmers to find out what incentives seem appropriate for the extent of mentoring expected and the needs of that particular community can be a meaningful strategy in strengthening mentoring programs. Creating social spaces through conferences, field days, or retreats and providing professional development opportunities for experienced farmers can be less formal ways to incentivize mentoring and recruit mentors.



Photo Taken by Troy Freund

One of the top challenges identified is finding appropriate mentor-trainee matches. Matches were typically based on the enterprise of interest, geographical proximity, and expectations. Mentoring relationships can be rewarding and fruitful or frustrating and stress-producing. It largely depends on the personalities and circumstances of both the mentor and trainee. Many of the programs actively matching mentors and trainees or facilitating that process identified a robust, intensive application process as a key to success. An application process that requires the mentor and trainee to state their expectations and needs explicitly can allow for more compatible matches to be made. Additionally, an interview process in which both parties ask meaningful questions around

work philosophies, learning styles, and expectations can be critical in identifying good matches. These intensive application processes can be resource-intensive to manage as well as a disincentive for trainee and mentors, but will ultimately lead to more meaningful and productive mentoring relationships. Within informal mentoring settings, application processes are obviously not relevant, but informal mentoring allows for people to self-select mentors and trainees which fit well.

Network building was identified as a key mentoring strategy that also creates broader positive community outcomes. It can take place among and between experienced and beginning farmers within a community, and can be built into any type of mentor program through extra time before or after trainings, conferences, field days, community meals, on-line organizing, and farmer steering committees directing the organization's work. These networks allow for new and experienced farmers to build relationships outside of one-on-one mentoring, enhancing community connectivity and reducing isolation.

The most effective mentoring programs are embedded within a community and employ multiple strategies to engage beginning and experienced agricultural producers. In addition to matching mentors and trainees, they provide trainings, host social gatherings, and provide resources to farmers. Flexibility and diverse approaches strengthen and enrich these programs because they include more community members in their work and build relationships with producers over time through multiple venues.



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Key Challenges

Every mentoring program faces certain challenges. Many challenges were particular to the programmatic context of the organization but there were several commonalities: funding; finding appropriate matches; legal issues; proprietary knowledge; and communication gaps.

The majority of these programs were funded through grants, which can reduce the sustainability of many programs. Beginning farmer issues are a growing focus of the USDA as well as many foundations, but there is no guarantee that these issues will be a sustained programmatic funding area. Most of the programs in existence for more than five years described cyclical funding, resulting in variable activity within the program. Additionally, many of the strategies mentioned above are contingent on resources and staff time. As funding is cut or staff time is shifted to fundraising instead of programmatic work, this shift in focus is reflected in the strength of the mentoring program. The ephemeral funding streams for many of these programs jeopardize the longer-term benefits of mentoring programs, which are strengthened as they gain traction in communities over time. There needs to be an acknowledgement by organizations as well as funders that mentoring programs are most meaningful when they are perennial. From an organizational level, alternative sources of funding via event proceeds, entrepreneurial

projects, and participant fees must be explored. From a funder perspective, grants must be designed and distributed in a way that promotes the longer-term sustainability of these types of projects.



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The effectiveness of a mentoring program is dependent on the creation of meaningful and productive relationships between trainee and mentor. Finding appropriate matches can be a continual struggle for organizations. Matching is an inherently difficult process due to the time and resource constraints of many experienced and beginning farmers as well by the dynamic, sometimes ephemeral interest of beginning farmers. Farming is a difficult occupation, with long hours and significant physical requirements. Apprenticeships and internships can be a space in which beginning farmers realize that farming is not appropriate for them. Additionally, beginning farmers are often not good at identifying what and where they need guidance. The expectations of the mentor and trainee relationship can be quite different. These differences can be compounded if the trainee is living on-site. Many mentoring programs have worked to develop an application process and resources that help both experienced and beginning farmers define their expectations and needs. Lastly, many regions are not served by mentoring programs and many beginning farmers are not able to find informal mentors

with similar enterprises. This sense of isolation for beginning farmers can be a significant challenge.

Mentoring programs in which trainees work and/or live on farm with mentors face a number of significant legal issues around both labor and housing laws. In the past, enforcement around these regulations has been lax, but enforcement is increasing, especially in the Western United States. These laws are meant to protect workers and tenants and prevent exploitative behavior. In mentoring programs exploitative behavior is unacceptable, but in some states the unique arrangements that exist between mentor and trainee can violate labor laws. Additionally, issues of liability and workers' compensation are significant and increasingly important to address in mentoring programs. Programs must become better equipped to help mentors navigate the regulations that apply to their farm work. They must also educate local policy makers about the importance and unique nature of mentoring programs.

In mentoring programs situated within a community, some programs found that mentors were willing to share a certain amount of information about production techniques and management, but that some information was proprietary. When farmers are dealing with specialized markets, the entrance of new, very similar operations into the local market can be problematic. Mentoring programs need to work with mentors to establish what mentors feel comfortable sharing, and have earnest discussions with mentors about how they can encourage the trainee to be innovative in the local marketplace.

While not all beginning farmers are young, many beginning farmers are younger than their mentors. There are significant generational differences in communication that are reflected by the outreach strategies utilized by mentoring organizations. Beginning farmer outreach strategies included

a significant number of on-line information dissemination tools, and younger farmers access information in different places and methods than older farmers. Many organizations rely heavily on on-line listings and communication, but for some experienced farmers these are not effective means of recruitment or retention. This generational communication gap is something that mentoring programs have to grapple with as they design their outreach strategies and communication strategies. Program staff must appreciate the diversity in communication styles present in their program, and work to bridge those gaps.

As mentioned earlier many farmers, both mentors and beginning farmers are in remote regions. The increased use of on-line tools such as YouTube, Skype, Google SketchUp, and others can be an asset for farmers to connect and share resources. This on-line networking, however, is also limited by the poor Internet access present in many rural communities.

The Role of Mentoring Programs in Sustaining Family Farming

Mentoring Programs play a key role in bringing beginning farmers into agriculture and helping these new producers become and remain viable. These programs are able to build a network of experienced and beginning farmers that strengthens communities and local food systems. Mentoring can provide defining experiences for beginning farmers, helping producers learn production and management techniques as well as troubleshoot issues. Sharing knowledge is essential as beginning farmers, who may not come from agricultural backgrounds, enter farming and ranching. Mentoring programs are able to provide sources of labor or limited income for mentors who participate in established mentoring programs. These small incentives can strengthen family farms and build lasting alliances between farmers.

Lastly, mentoring programs strengthen and reinvigorate the local foods movement by bringing new, diverse farmers into agriculture and strengthening linkages within agricultural communities.



Photo Taken by Troy Freund

Conclusion

The introduction to this report presented many of the challenges facing beginning farmers. Mentoring programs are able to enable beginning farmers by offering training and support as they begin or consider beginning their own enterprises. Mentoring programs, however, alone will not reinvigorate U.S. agriculture. The issues of land access, high start-up costs, health insurance, risk management, and market access are not generally addressed by mentoring programs. Land transition programs attempt to help producers overcome issues associated with

land access and start-up costs, but for many beginning farmers they do not have enough initial assets or production history to qualify for sufficient credit. Some mentoring programs have coupled their mentoring with asset-building programs, such as savings matching, and support through USDA or local agricultural department grants. The upsurge in mentoring programs has been a positive trend, but they must be coupled with similar programs that help beginning farmers to build equity, provide a safety net, and increase market access for these producers by supporting the local food movement.



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Appendix 1

Organization	Location
Agriculture & Land Based Training Association (ALBA)	Salinas, CA
Center for Rural Affairs	Lyons, NE
Colorado State University Extension: Beginning Farmer Center	Longmont, CO
Georgia Organics	Atlanta, GA
Greenhorns	Red Hook, NY
Holistic Management International	Albuquerque, NM
Iowa State University Extension: Beginning Farmer Center	Ames, IA
Land Stewardship Project	Minneapolis, MN
Maine Organic Farmers and Gardeners Association (MOFGA)	Unity, ME
Midwest Organic and Sustainable Education Service (MOSES)	Spring Valley, WI
Mississippi Association of Cooperatives	Jackson, MS
Practical Farmers of Iowa	Ames, IA
Ranch Management Consultants	Fairfield, CA
South Dakota State University Cooperative Extension	Rapid City, SD
University of Idaho: Cultivating Success	Moscow, ID
University of Missouri: Food and Agriculture Policy Research Institute	Columbia, MO
University of California-Berkeley	Berkeley, CA
VT Women in Agriculture Network (VT WAgN)	Berlin, VT
Virginia Department of Agriculture: Farmland Preservation	Richmond, VA
Willing Workers on Organic Farmers-USA (WWOOF-USA)	Laguna Beach, CA
Wisconsin School for Beginning Dairy and Livestock Farmers	Madison, WI

Appendix 2

Farming and Fishing Mentorship Program Interview Questions:

1. How long has your organization been working on farming/fishing mentorship?
2. What strategies does your organization use to connect beginning farmers/fishers to experienced ones?
3. Have these strategies proven successful? If so, what seems to work best?
4. What have been the key challenges in connecting mentors and trainees?
5. How many farmers/fishermen have participated in the program?
6. How many beginning or student farmers/fishermen have participated in the program?
7. What has been the success rate of these partnerships?
8. Has this program helped family farms/fishing enterprises to continue?
9. On average, how sustained is the relationship between the farmers/fishermen and their students?
10. Do you follow up with the mentors or mentees?
11. What are the key obstacles in your program?
12. How do you reach out to experienced farmers/fishermen?
13. How do you reach out to interested students?
14. What kinds of resources are necessary for a program like yours?
15. Are there any ways you would like to expand or strength your program? If so, how?
16. Do you know of any other mentorship programs or organizations that I should contact?

Section 3: Mentor Tools

The mentoring tools that are included within this section are designed to help potential mentors think critically about the practicality of mentoring on their farm, their own strengths and challenges as mentors both personally and professionally, and also equip potential mentors with information about the business aspect of mentoring including legal considerations and relevant regulations. This toolkit is a collection of tools that have been created by mentors, mentoring program staff, and Department of Agriculture staff. In particular, this compilation of tools draws heavily from the work of the Northeast Small Farm Institute (NESFI). NESFI has been committed to expanding the regional and national discussion around mentoring, creating resources for mentors and trainees as well as conducting groundbreaking research around the needs of beginning farmers and experienced farmer mentors. In addition to NESFI, tools were gathered from Cultivating Success, an organization that supports sustainable small farm education in Idaho and Washington, Northeast Organic Farming Association of New York, the Washington State Department of Agriculture, and the Western Sustainable Agriculture Research and Education program. This selection of tools is only a sample of what tools are available, if you are seriously considering becoming involved in a mentoring program or individually mentoring on your farm, we encourage you to seek out the full publications of which these excerpts are part.



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Conceptualizing Mentoring on Your Farm

This section of the toolkit provides potential mentors tools to assess their motivations, resources, and expectations. These evaluative tools are designed to help potential mentors think critically about why they want trainees, what are the resources and facilities that they have for mentoring as well as their own experience and knowledge base. These tools will help potential mentors decide if mentoring is a good and feasible fit, what modifications or improvements need to be made, and build a farm mentoring policy that suits their operations and needs.

An excerpt from “Internships in Sustainable Farming: A Handbook for Farmers” by Doug Jones and published by the Northeast Organic Farming Association of New York Inc.

Is an Internship Right for You?

At a 1996 meeting organized by NOFA-VT, farmers who had hosted interns agreed that a clear distinction needs to be made between the educational orientation of internships and what is primarily an economic and production orientation of a regular employer/employee arrangement. Employees on farms range from highly skilled managers to migrant farm laborers who are hired only for crop harvest. Employees usually do specialized work in one area of the farm; they often have prior experience; they receive an hourly wage and usually do not live with you. State and federal governments have many regulations and officials assigned to protect workers from exploitation by employers. The relationship between employers and employees is based strictly on the efficiency of the farm worker being commensurate with the pay received.

With interns, on the other hand, farmers assume a much greater obligation to instruct. Interns expect farmers to explain the “whys,” not just the “hows”. Interns deserve and expect a diversified learning experience through a broad exposure to many different tasks, as well as through frequent discussion of the overall goals, methods, and systems of the farm. They are preparing themselves for a vocation, or at least learning how to grow their own food. Interns usually live on the farm, expect to interact socially with farmers, and may have other learning goals as well, such as learning a variety of rural living skills (food preservation, construction, etc.). Hopefully, they will share some of your ideals and aspirations, and a mutually beneficial relationship will prevail, based on the farmers’ willingness to teach and the interns’ desire to learn.

Despite the actual differences in goals and activities, in New York State, there is no distinction made between employees and interns in the Minimum Wage Order for Farm Workers. Therefore, the minimum wage law applies to interns. If food and lodging are provided by the farmer, these costs can be subtracted from the hourly wage. The specific costs that can be subtracted are contained in the minimum wage order, contained in Appendix 1.

The potential rewards of hosting interns, as reported by a number of farmers, include: obtaining eager enthusiastic help that is affordable to the small sustainable farming operation whose owners typically make a very modest profit; the opportunity to contribute

to the growth of sustainable farming by passing on your knowledge and experience to the next generation of food growers; the formation of new friendships and the potential personal fulfillment that can come from inspiring and mentoring budding farmers and gardeners.

As many farmers have discovered, there are potential drawbacks and problems related to these rewards. Some have dropped their internship programs out of frustration with these problems. Such a program is not for everyone. This handbook was written in the hope that a number of these problems can be avoided through sharing experiences and ideas of host farmers and former interns, better planning and working together to provide a more cohesive, diverse intern experience.

Along with eagerness and enthusiasm can come a romanticized view of farming, ignorance of the endurance required, or difficulties with transition from an urban to a rural lifestyle. Farmers must convey a realistic image of what the intern candidates are getting themselves into through your literature and interviews. Let interns know that you are not operating a summer camp. As one grower put it: “I stress the negatives: long hours, hot sun, hard work. I also stress the need for strong commitment and good reasons for wanting to do this type of work. I encourage people to visit other farms, stress the importance of finding the right farmer/apprentice fit. I try to help people screen themselves out.”

This is an important point-many a disappointment probably could have been avoided by clearer initial communication of realities and expectations, and by a more thorough interviewing/screening process. The next two sections of this handbook offer useful ideas to accomplish these goals. Another consideration: Is an internship really an “affordable” source of help for your operation? How much time, energy, and patience are you willing to devote to novices and their learning process? Are you prepared to train a whole new work force each year? Are you willing to learn the needs, strong points, and personality of each new person? Can you befriend them and then say good-bye a few months later? Do you like to teach? (In Germany, which has a highly organized apprenticeship system, farmers must first attend classes in how to teach apprentices, before being certified as host farmers.) Very few successful internships happen on larger farms; apparently, the farmer can’t give the individual attention necessary.

Your program will evolve over time, along with your ability to provide instruction. Experienced host farmers who offer an extensive, in-depth learning experience usually put substantial effort into selecting, from a large pool of applicants, those with great motivation and preferably some prior experience in farming or gardening. Some even specifically recruit interns who are sure they want to make their living in farming. Such an intern will eagerly absorb the farmer’s knowledge and methods, and will be dedicated to the tasks at hand and to exploring more efficient ways to grow and market food.

Such an intern is also relatively rare-the “career-track” intern with prior experience, who balances initiative and creativity with a reasonable respect for your experience and authority. Most applicants are in the novice category, but, after all, someone has to offer the initial farming experience which turns a beginner into an aspiring farmer.

Many internship applicants are not considering farming as a possible career. They are looking for a farm experience where they can learn to grow their own food. Some want to learn about environmentally responsible food growing and rural living, to enhance what they will have to offer as a teacher, community organizer, health care practitioner, Peace Corps Volunteer, etc. Many of these applicants will be dedicated workers, if their needs, educational goals, and personalities are well matched to the host farm.

“Needs” and “personality” deserve careful consideration. Do their expectations match what you have to offer, and vice-versa? Do they have a “chip on their shoulder” about authority figures; do they think they “have it all figured out”? Are they crushed by what they perceive as negative feedback? (Are you in the habit of giving positive feedback? Are you skilled at giving honest feedback?) Are they low on initiative and confidence, requiring you to suggest every move they make? Do they seem to have other friends and interests that will be pulling them away from your farm, or cause them to quit outright in mid-season?

Of course the initial farm visit can’t offer definitive answers to all such questions. But they are drawn from real experiences of other farmers, and offered here to encourage you to be thorough in your selection process and to help you anticipate how you might deal with such situations if they arise. Very often, an honest, respectful, heart-to-heart talk or evaluation session will improve such difficult situations dramatically. Ideally, such evaluation sessions should be scheduled at intervals throughout the internship.

Some former interns also have their sad stories to tell about farmers who misled them, overworked and undereducated them, threw frequent temper tantrums, gave constant negative feedback, neglected them, spent much time away from the field or the farm, “micro-managed” them, or were simply unrealistic in what they offered or expected from their interns. The purpose of this handbook, which is based on successful internships, is to help farmers assess their own suitability for engaging interns, create the best possible program, and reap the substantial rewards awaiting both farmer and intern.

An excerpt from "The On-Farm Mentor's Guide: Practical Approaches to Teaching on the Farm," written by Miranda Smith and published by New England Small Farm Institute

WORKSHEET #4

MOTIVATIONS FOR BECOMING AN ON-FARM MENTOR*

On a scale of 1-5, with **1=very important** and **5=not important**, rate your motivations for becoming an on-farm mentor by putting an X in the appropriate box:

Motivations:					
I need labor for my farm.					
I like working with others.					
I love to teach.					
I want to help create educated consumers.					
I had a good training experience and want to provide the same opportunity for others.					
I want to share my love of the farming lifestyle with others.					
I want to help to train a new generation of farmers.					
I like the energy of having "new blood" on my farm.					
I want to spend time with others who enjoy farming.					
Other:					

My *primary* motivation for on-farm mentoring is:...

An excerpt from “The On-Farm Mentor’s Guide: Practical Approaches to Teaching on the Farm,” written by Miranda Smith and published by New England Small Farm Institute.

WORKSHEET #1

FARMING KNOWLEDGE AND SKILLS SELF-EVALUATION EXERCISES*

Sections I and II of this exercise are adapted from guidelines proposed by experienced on-farm mentors to help you complete a self-evaluation prior to elective peer (i.e., mentor-to-mentor) review. It is designed to assist aspiring and practicing mentors in a process of candid self-evaluation. Place a “✓” in the box that most accurately represents your response to each question, with 1= **strongly agree** and 5= **strongly disagree**. Then total the number of checks you have made in each column. High numbers in Columns 4 and 5 suggest that planning for improvement is a good idea. Section III includes additional questions developed by an experienced on-farm mentor. Use Section IV to create a summary statement of what these exercises have taught you. Keep a record of the results on file and use the outcome to guide your steps toward improvement in deficient areas.

I. Farming Knowledge and Skills Self-Assessment

AGREE → DISAGREE

1	2	3	4	5	
					Other farmers often ask me for advice.
					I produce healthy crops and/or healthy animals.
					I have a fertility plan and conduct regular soil tests, etc.
					I participate in on-farm research projects.
					I have improved in one or more important areas over the last year. (Make a note of these areas.)
					I have improved in one or more important areas over the last five years. (Make a note of these areas.)
					I keep up with current research relevant to my farm.
					I have access to appropriate technology for the scale/type of my farm operation.
					I am conscientious about maintaining and repairing equipment.
					All in all, I feel confident about my technical farming knowledge and skills.
					Total

* Note: You may decide to use the self-evaluation worksheets in this guide to create your own evaluation forms and/or an evaluation form that your trainees may use.

WORKSHEET #1 (PAGE 2)

**FARMING KNOWLEDGE AND SKILLS
SELF-EVALUATION EXERCISES (CONT'D)**

II. Farm Management Knowledge and Skills Self-Assessment (CONT'D)

AGREE → DISAGREE

1	2	3	4	5	
					I have a business plan.
					I have a whole farm plan.
					I have a marketing plan.
					I am conscientious about keeping good records.
					I am an effective time manager.
					My paperwork and routine jobs are done in a timely fashion.
					I am rarely behind in one or more management areas.
					I am an effective personnel manager.
					The rate of my employee turnover is ok.
					I provide proper employee compensation and adhere to the terms of employee agreements and contracts.
					I provide employees and others with a clear work schedule.
					I manage my farm business in compliance with state, local, and federal laws and regulations.
					My farm has a good safety record.
					The general appearance of my farm reflects good management.
					I carry necessary insurance in sufficient amounts.
					My farm is achieving annual increases in sales.
					My farm does business based on fair contracts.
					There is good evidence that my customers are well satisfied. If, for example, my farm is a CSA, the rate of membership turnover is acceptable.
					My farm serves a diversity of markets.
					I can effectively manage and/or am free from debt.
					If I rent or lease farmland, I have a good relationship with the owners.
					All in all, I feel confident about my farm management knowledge and skills.
					Total

FARMING KNOWLEDGE AND SKILLS SELF-EVALUATION EXERCISES (CONT'D)

III. Farming Knowledge and Skills Questionnaire:

1. Do other farmers in my region come to me for any sort of production advice?
If so, how much experience do these farmers have and what advice do they seek?
2. Do other farmers in my region come to me for any sort of farm management advice?
If so, how much experience do these farmers have and what advice do they seek?
3. In which areas have I most improved my skills over the last five years?
For example, in the areas of: disease prevention and control; scheduling labor; post harvest handling techniques. How have I done this? For example, reading books, asking advice from other farmers, experimental trials. Describe the improvement.
4. In which areas have I most improved over the past year? How have I done this?
Describe the improvement.
5. Which aspects of producing my crops or livestock are the most challenging for me today?
6. Which aspects of managing my farm business are the most challenging for me today?
7. How do I plan to become more adept in these areas?
8. How do I react when confronted with a problem that is new to me?
9. Do I always make a plan for the workweek that takes weather and other possible interferences into account?
10. What percentage of the time do I stick to the weekly plan?
11. Do I often run low on necessary supplies and inputs?
12. What percentage of the time do I keep up with paperwork?
13. Do I customarily pay my bills on time?
14. Do I usually invoice on a regular basis?
15. Do I know enough about the following topics to teach them well or would trainees profit from learning about them from another farm mentor?
 - a. Soil science: fertilizing and amending; making compost.
 - b. Plant science: processes, environmental interactions.
 - c. Crop production: seeding, transplanting, culture, harvest, post-harvest handling, packing.
 - d. Animal science: health care (curative and preventive; emergency measures); rations (adjustments, mixing my own); reproduction (insemination, nutrition, birthing, baby care).
 - e. Market research and marketing.
 - f. Business administration and management (business planning, financial analysis).
 - g. Labor management.
 - h. Equipment operation, repair, and maintenance.
 - i. Other

An excerpt from "The On-Farm Mentor's Guide: Practical Approaches to Teaching on the Farm," written by Miranda Smith and published by New England Small Farm Institute

WORKSHEET #7

TRAINING FACILITIES EVALUATION

Section I of this exercise is adapted from guidelines proposed by experienced on-farm mentors to help you complete a self-evaluation prior to elective peer (i.e., mentor-to-mentor) review. It is designed to assist aspiring and practicing mentors in a process of candid self-evaluation. Place a "✓" in the box that most accurately represents your response to each question, with 1= **strongly agree** and 5= **strongly disagree**. Then total the number of checks you have made in each column. High numbers in Columns 4 and 5 suggest that planning for improvement is a good idea. *Section II* includes additional questions developed by an experienced on-farm mentor. Use *Section III* to create a summary statement of what these exercises have taught you. Keep a record of the results on file and use the outcome to guide your steps toward improvement in deficient areas.

I. On-Farm Training Facilities Evaluation

AGREE → DISAGREE

1	2	3	4	5	
					My farm offers adequate teaching/classroom space.
					I have a quality resource library for use by trainees.
					I have adequate places for trainees to study.
					My trainees have access to the Internet.
					My facilities appropriately complement my production practices.
					I have a potentially private space for mentor/trainee meetings.
					I have a place for secure storage (e.g., for confidential information and money).
					I have a well-equipped, nicely organized farm shop with owner's manuals as well as needed tools and supplies.
					I have a schedule board/posting board located in a prominent place on the farm.
					I have adequate restroom and hand-washing facilities.
					All in all, I feel confident about my training facilities.
					Total

TRAINING FACILITIES EVALUATION (CONT'D)

II. Training Facilities Questionnaire

1. Have I set aside areas in the field, greenhouse, or barn for trainees to use as “laboratories” or areas where they can carry out individual projects?
2. Have I set aside a clean, quiet space for classroom instruction?
3. Do I have adequate numbers of hand tools and other equipment so that I can teach a hands-on skill to all trainees simultaneously?
4. Are all areas, e.g. barns, packing shed, equipment shed, well organized and clear of safety hazards?
5. Is there a place for every tool and are these spots well labeled?
6. Do I have a procedure for cleaning tools and a spot to do it?
7. Have I posted useful information in the barn, packing shed, or other buildings and in outdoor work areas where trainees are expected to work on their own?

III. Training Facilities Evaluation Comments:

An excerpt from "The On-Farm Mentor's Guide: Practical Approaches to Teaching on the Farm," written by Miranda Smith and published by New England Small Farm Institute

WORKSHEET #8

RESIDENTIAL FACILITIES EVALUATION

Section I of this exercise is adapted from guidelines proposed by experienced on-farm mentors to help you conduct a self-evaluation prior to elective peer (i.e., mentor-to-mentor) review. It is designed to assist aspiring and practicing mentors in a process of candid self-evaluation. Place a "✓" in the box that most accurately represents your response to each question, with 1= **strongly agree** and 5= **strongly disagree**. Then total the number of checks you have made in each column. High numbers in Columns 4 and 5 suggest that planning for improvement is a good idea. Use *Section II* to create a summary statement of what this exercise has taught you. Keep a record of the results on file and use the outcome to guide your steps toward improvement in deficient areas.

I. Residential Facilities Evaluation

AGREE → DISAGREE

1	2	3	4	5	
					My trainee housing accommodations are comfortable and clean.
					I provide an adequate kitchen and bathroom for trainee use.
					My trainees are provided with adequate privacy.
					I offer residential facilities for trainees that are <u>not</u> located in my own residence, and they are up to code.
					I offer residential facilities for trainees that are <u>not</u> located in my own residence, and I am sufficiently well acquainted with all relevant regulations covering agricultural employee housing to be sure that the above statement is true.
					I offer residential facilities for trainees that are <u>not</u> located in my own residence, and I have established clear "house rules" for use of these facilities.
					I offer residential facilities for trainees that <u>are</u> located in my own residence and have established "house rules" that reflect and respect the needs of my household members as well as trainees' needs.
					All in all, I feel confident about my residential facilities.
					Total

II. Residential Facilities Evaluation Comments:

An excerpt from “Internships in Sustainable Farming: A Handbook for Farmers” by Doug Jones and published by the Northeast Organic Farming Association of New York Inc.

Designing Your Mentoring Program

It is highly useful to sit down and consider all the elements listed below, and then spell out your plans in a written description to clarify what you can offer, what your policies and procedures are, your expectations, etc. This description can then be sent to anyone who inquires about your internship. There are many possible ways to do most of these things; the remaining sections of this Handbook offer ideas drawn from the experience of other farmers. Here are some important things to consider and possibly include in your description:

- General description of your farm and philosophy of farming; description of yourself and your family, your lifestyle, types of crops, marketing, other enterprises, climate, locality, etc. Talk about the big picture, about your farm as part of the alternative agriculture movement which is changing our food system and our impact on the environment.
- Number of interns you plan to take; duration of stay. (Do you have any flexibility with these? If you take only one intern and don't have other people on the farm with whom he/she can easily socialize, he/she is likely to feel lonely and disappointed.)
- Living accommodations offered: level of privacy; how “primitive”; domestic chores expected; policy on visitors.
- Food provided: do interns cook for themselves? Cook with you? Do you cook for them? Do you supply all ingredients? How much is homegrown? Accommodation of different diets?
- Types of work to be done by interns; list of skills to be taught. The farmer should be specific in this area, with the understanding that different interns will have different goals which can be accommodated in a detailed agreement written by both the farmer and intern, discussed below.
- Wages offered; other bonuses, commissions, payments in kind. Some farmers offer wages that increase through the season, reflecting diminished need for training, greater competence, etc. Others offer a final bonus or profit share to those who fulfill their commitments through to season's end.
- Other learning experiences to be offered: planning sessions, on-farm tours or seminars, access to farm library, visits to other farms, classes, conferences, etc.
- Candid description of difficulty of the work, number of hours expected, days off, types of weather to expect to work in, mosquitoes to deal with.
- Safety & health concerns; insurance.
- Your expectations regarding their interest in and commitment to the work and the learning experience offered. How much flexibility is there for interns to choose different tasks?
- Plans for feedback on how things are going for everyone involved.
- Something personal about how your family likes to interact socially with interns.

- Recreational and social opportunities on the farm and in the local area.
- Method of applying; timing of visit/interview; questions you would like applicant to answer, either in letter form or on an application form drafted by the farmer.

Here is some information you may want to request:

- Please tell us about yourself, your interests, your long range plans, why you want to work on a farm.
- What do you hope to learn.
- Age and physical condition.
- Special considerations (diet, health).
- Previous related work or other experiences.
- Tell us what you think of our program, our policies, and how you would fit into our farm.
- When would you be available? (Any flexibility?).
- When could you come for a preliminary visit?
- Please provide 2-3 references we can contact regarding your learning style and work style.

Developing a Farm Policy

An Excerpt from “The Western SARE Internship Handbook” published by ATTRA and written by Maud Powell

Use the answers to these questions to formulate the basis of your on-farm policies. Providing interns with a clear set of guidelines about your farm is essential to creating a high-quality internship.

1. Time Management

What is your weekly schedule? (For each day, include time of rising, breakfast, commencement of first task, educational time, other meals, last task, completion of days' work.) Explain how times and tasks may vary, based on the day of the week (e.g., markets on Tuesdays and Fridays may require late work the previous evening and earlier-than-usual rising to accommodate travel time)? Does the schedule vary based on the season?

2. Meals/Consumables

Do you provide any grocery staples for interns? If so, what and how much of each? Can an intern eat whatever they want from the farm or take produce only when there is a surplus? Can they share produce with friends or family? Can they preserve farm products? Should they ask before they harvest any produce?

3. Time Off

Do you provide any time off during the season? How much advance notice do you require for an intern's planned trip or break? Must it coincide with slack periods on the farm?

4. Trial Period

Do you have a trial period? If so, for how long? Do you hold a meeting at the end of the trial period to formalize the internship?

5. Meetings

Do you hold regular meetings with your interns? What do your meetings consist of (daily plan; weekly plan; airing interpersonal issues; providing feedback)?

6. Questions and Feedback for Interns

Do you prefer to be asked questions about farming on a need basis? Would you rather be asked questions at specific times (during farm meetings; at the end of the day)? Are you willing to receive constructive criticism from your interns about your farm? Would you prefer that the intern conclude their internship before offering their observations about your farm?

7. Visitors

Can interns invite guests to visit the farm? Are there times or days of the week when they can visit (in evenings; on weekends)? Do you expect interns' visitors to do any farm work? If you are open to having visitors for more than a day or two, do you have

expectations about them participating in farm tasks? What expectations do you have about visitors' behavior while at your farm?

*An Excerpt from the 2008 Edition of the “Cultivating Success Mentor Handbook”
developed by Diane Green, Theresa Beaver, and Cinda Williams*

7 Tips for Setting up an On-Farm Internship

Having an intern can be a mutually beneficial arrangement for the farmer and student alike. The success of your internship will depend upon how you go about setting it up.

Most of us could use an extra set of hands around the farm. We could always use some help with assorted projects, but hiring an employee is not always a viable option due to financial limitations. You might want to consider offering an internship opportunity for a student interested in pursuing an agricultural endeavor.

The idea of offering an internship is to provide hands-on opportunity for a student to gain experience and possibly receive school credits related to a field of study compatible with your farming enterprise. This arrangement is usually short term. You could offer full-time or part-time work; depending on the terms you negotiate with the intern and the school (if the internship is associated with accreditation).

It is important that you realize that interns are not ‘just workers’ or ‘free labor’. The intern needs to be given a varied assortment of projects in the field as well as specific time spent learning from a farmer\mentor type situation. The success of your internship will depend upon how you go about setting it up.

The intern may be there simply to better understand what a farming enterprise is all about by participating in the daily duties of farm life. Or, they may be considering farming as a life vocation to become the next generations’ future sustainable farmer. It is important that we give them the most comprehensive learning experience possible. You need to show them not only what to do, but explain why they do it.

Seven Tips for Setting up an On-Farm Internship:

1. Arrange compensation for the intern.

- You might offer minimum wage (or higher), or work with the educational facility to ensure your interns will receive school credits while working for you. If you are paying wages, you will need to check into workman’s compensation regulations.
- Another option would be to provide room and board in exchange for labor, which would mean providing them with a place to stay and meals while in your service.
- Consider tallying hours worked in exchange for a dollar value to be traded or exchanged for fresh produce or winter vegetables for

storage.

2. Identify how the intern will benefit.

- The intern will gain practical, 'hands-on' experience in the field he or she is studying. They will also gain a work reference to add to their resume. Some may develop relationships with farmers who provide mentoring and support after the internship is over. If arranged, the school credits are an additional bonus.

3. Identify how the farm will benefit.

- You get an extra set of hands to help out on a temporary basis, but you do not have the same obligations that you have to a regular employee. You pay lower wages, if any at all, and you are not obligated to hire the intern at any point in the arrangement.
- If you are looking for permanent employees down the road, interns give you a good understanding of a person's skills and their fit for your workplace before you hire. Additionally, if you set up a good internship program, you will develop relationships with university faculty who will introduce you to recent graduates if you indicate an interest in acquiring future employees.

4. Understand what is expected with this type of agreement.

- You will be expected to provide the student-intern with a legitimate work experience. You will be expected to provide orientation and training for the tasks he or she will perform. You will be expected also to supervise and provide pertinent feedback to both the intern and the school that is offering the internship. Naturally, you will be expected to provide the intern with a safe and respectful work environment.

5. Know what to expect from the school.

- Look for a well-organized internship program. You should be assigned to a contact person who will oversee the internship placement. This person should be available to you (within reason) in event of problems or situations that require discussion. The school should also provide you with an internship contract and clear information regarding its requirements and expectations.

6. Know how to make the internship a good experience for the intern.

- Be sure that you have work available for the intern, and be sure that the work is pertinent to their program of studies. If an intern is studying agricultural production, for example, and you put him to work answering the phone and dealing with customers, the intern will have no opportunity to hone the skills he is studying and frustration will most certainly be the result.
- Naturally, a certain amount of "grunt work" is acceptable, as most jobs have their boring elements. Be sure, also, to include your intern in meetings and planning sessions whenever possible.

7. Discover how to go about finding an intern.

- Identify the nature of the tasks you want the intern to perform, and then contact the College of Agriculture and/or the Plant Science or equivalent department at a school, college or university offering appropriate programs. Find out how their internships or internships work, and how the two of you might work together.

Cultivating Success Farmer Mentor Responsibilities

- If the intern is an academic student, the Farmer Mentor will develop a Plan of Work with the student and a faculty advisor that clearly states learning objectives, and outlines work tasks, instructional sessions, and a project schedule for evaluation. If the intern is a community member earning CEU credits, expectations for his/her participation will be developed by Farmer Mentor and a university or extension representative at the beginning of the internship.
- Farmer Mentor will instruct the intern, in a classroom setting and on farm, on the practical skills and concepts of intensive, small acreage farming and/or ranching and market gardening, to include any or all of the following:
 - o Vegetable production
 - o Flowers production
 - o Herbs
 - o Berries
 - o Tree crops
 - o Livestock and/or livestock
 - o Planting
 - o Composting
 - o Fertilizing
 - o Irrigating
 - o Harvesting
 - o Pest control
 - o Greenhouse/season extension
 - o Marketing and record keeping
- Farmer Mentor will direct daily activities of interns in production, marketing and maintenance of the small acreage farm/ranch or market garden.
- Farmer Mentor may be required to maintain a monthly progress report to evaluate student's performance, and evaluate the intern at close of season.

An Excerpt from “Western SARE Farm Internship Handbook” published by ATTRA and written by Maud Powell

Adding Value to Your Farm Internship: A Checklist

A basic internship offers the opportunity to live and work on a farm for part or all of a season. But you can take certain steps that will increase the value of the intern’s experience. Following are some fairly simple ways to create a value-added internship and improve the success of your program.

- Meet weekly with interns to review the past week, plan for the coming week, and discuss any relevant issues.
- Offer interns a small area of land to grow a crop of their own or let them choose a project to work on in their free time.
- Include interns in farm-planning discussions.
- Be aware of agricultural workshops in your area, and give interns the day off to attend.
- Offer reading assignments to interns.
- Make your agriculture library available to interns.
- Discuss your philosophy of farming with interns. Ask them about theirs.
- If you live near other farms that also use interns, consider setting up an internship cooperative so all interns get the benefit of seeing how other farms function.
- If interns have any problem with their housing situation (plumbing, electrical, etc.), make it a priority to fix it.
- Offer interns preserved food or winter-storage produce when their internship concludes.
- Encourage interns to take time off the farm sometimes. Let interns know about any swimming holes or favorite hikes in your area.
- Offer interns a weeklong break at some point in the season. Vegetable producers find that the optimal time for this is in mid-July.
- Give interns opportunities to sell at grower’s markets.

Recruiting and Selecting Trainees

Mentors looking for prospective trainees should also use the mentoring program directory in Section 5 of this toolkit. This directory includes organizations and on-line directories that help farmers connect to potential trainees.

An excerpt from "The On-Farm Mentor's Guide: Practical Approaches to Teaching on the Farm," written by Miranda Smith and published by New England Small Farm Institute

WORKSHEET #11

PROMOTING YOUR TRAINING PROGRAM

Complete the exercise in Section I, below, prior to developing promotional material for your program. It will give you a head start in writing a description of your training program. It may also help you create a full description of your farm and the training opportunities you offer. The check list in Section II provides guidance in how to "get the word out" once your message is ready to go.

Section I: Program Description Exercise

My major farm enterprises, in order of economic importance:

Acreage given to each enterprise:

My farming goals for the coming season:

My farming philosophies:

Description of my farming methods (e.g., certified organic, organic but not certified, sustainable) and practices (e.g., I use plastics):

Number of trainees that I want:

Number of hired, non-trainee workers that I want:

Dates I want trainees:

Level of experience, background, and interests that I prefer:

Work trainees will be expected to do and approximate percentage of time to be spent on each:

Hours per week of classroom instruction:

Trainees should expect to learn:

Trainees will have an opportunity to spend ____ hours/week and use ____ sq. ft. of ____ (land/building space) doing an independent project if they so desire.

Opportunities to train at my farm after the first year, if any.

If yes, training will entail:

Areas of expertise that I can teach well:

Areas of weakness/unfamiliarity that I cannot/do not choose to teach:

Shared teaching arrangements with other on-farm mentors:

Educational opportunities with other farmers/trainees:

Hours/week that trainees are expected to work:

PROMOTING YOUR TRAINING PROGRAM (CONT'D)

Section I: Program Description Exercise (CONT'D)

Trainee wages:

Living accommodations:

My family/household is composed of:

My family diet includes/does not include animal products:

Recreational opportunities in nearby community:

Amenities and services (e.g., libraries, shopping areas, medical centers) in nearby community:

Trainees will/will not need their own vehicle for private use:

Highlights of the farm, training program and community:

Section II: Getting Out the Word

1. Do I advertise my training program:
 - a. through one or more apprentice matching services?
 - b. at universities and colleges in my region?
 - c. through any on-line services?
 - d. through flyers at conferences, in newsletters, by word of mouth?
2. Do I share information about prospective trainees with other farmers?
3. Have I prepared an application form for prospective trainee use?
4. Have I prepared an information packet to send to prospective trainees?

Section III: Training Program Promotion Comments:

Excerpted from the "Western SARE Farm Internship Handbook" written by Maud Powell

Selecting Your Interns

Once the prospective interns contact a farm, the grower should have a procedure for screening and selection. This procedure could involve any or all of the following elements:

- a written application;
- a formal interview (see list of sample interview questions)
- conversations by e-mail, in person, or on the phone;
- checking references;
- An on-site visit, a working visit or a trial-period

Many farms have prospective interns complete an application (see farm web sites in ATTRA Internships List for examples). We highly recommend setting specific policies and discussing them with prospective interns to provide more information about your expectations. The list of Key Interview Questions (below) can be used to develop a list of policies. Offering detailed information about your farm operation will allow prospective interns a chance to self-select.

Most farmers insist on a face-to face meeting before making a final selection. If a prospective intern lives too far away to visit beforehand, use all other available means of screening. Some farmers recommend a working visit, in which a prospective intern will visit for an afternoon and work on a project with the farmer.

Once agreement has been reached, it may be best to have the intern sign an on-farm agreement to establish a formal relationship. Many farmers say that agreeing on definite start and end dates helps set a precedent for clear boundaries. If a farmer has any doubts or concerns about a perspective intern, he or she should either opt to offer a short-term trial period or not invite the person. Most farmers agree that it is much better to wait for a better applicant and be short-handed for a few days or weeks, than to select a questionable applicant and face more complications down the road.

Key Interview Questions

1. What kind of physical labor have you done?

Farmers are looking for reliable people who will stay through the long and sometimes arduous-growing season. Many first-time interns have romantic notions about farming, which need to be tempered with some grit. The reality is that most young people today have not done a lot of physical labor and are not prepared for the very physical nature of farming.

2. What are your long-term agriculture goals?

Chances are, someone who is really passionate about a future in farming will be more likely to work hard and stay through the entire season than someone who just wants an interesting summer experience.

3. Tell me about your living preferences.

This question will be more or less important depending on the intern's living situation. For example, if interns are expected to live on site and share cooking facilities and meals, eating preferences may be a big issue.

4. Tell me about your working style.

Asking prospective interns about their working style may give farmers important insights into their attitudes about work. This may be a difficult question for some interns to answer, so use some of these follow-up questions to get more information: Do you prefer to work alone or on a team? Do you like a lot of instruction and guidance, or do you prefer to observe and try things on your own? Do you prefer to start and end early or take frequent breaks? What have been your favorite jobs?

The answers to these questions will help indicate whether your working styles are compatible. Compatibility will depend, in part, on your farm situation. For example, a very social person who likes to work in groups is bound to struggle on a geographically isolated farm that has no other interns.

WORKSHEET #10

TRAINEE RECRUITMENT AND SELECTION

Section I of this exercise is adapted from guidelines proposed by experienced on-farm mentors to help you conduct a self-evaluation prior to elective peer (i.e., mentor-to-mentor) review. It is designed to assist aspiring and practicing mentors in a process of candid self-evaluation. Place a "✓" in the box that most accurately represents your response to each question, with **1= strongly agree** and **5= strongly disagree**. Then total the number of checks you have made in each column. High numbers in Columns 4 and 5 suggest that planning for improvement is a good idea. *Section II* includes additional questions about trainee orientation developed by an experienced on-farm mentor. Use *Section III* to create a summary statement of what these exercises have taught you. Keep a record of the results on file and use the outcome to guide your steps toward improvement in deficient areas.

I. Trainee Recruitment and Selection Knowledge and Skills Self-Assessment

AGREE → DISAGREE

1	2	3	4	5	
					I offer a clear and comprehensive statement of my farming philosophy.
					I communicate a clear understanding of my farming goals.
					I have an effective method of marketing/promoting my program.
					I have developed an adequate trainee application process.
					I am able to articulate my expectations of trainees.
					I make available a comprehensive trainee/apprentice handbook.
					I conduct a reference check of potential trainees.
					I offer trainees an opportunity for reference-checking my own training program and mentoring abilities.
					All in all, I feel confident about trainee recruitment for my program.
					Total

WORKSHEET #10 (PAGE 2)

TRAINEE RECRUITMENT AND SELECTION (CONT'D)

II. Trainee Orientation Questionnaire

1. Have I prepared an orientation packet for trainees?
2. Do I introduce trainees living on the farm to the surrounding area
(e.g., to libraries, grocery stores, restaurants, swimming and hiking areas)?
3. Have I made living accommodations on my farm comfortable and reasonably private?
4. Have I clearly explained both living and social expectations and do I hand out written guidelines for these expectations?

III. Trainee Recruitment and Selection Evaluation Comments:

Teaching Tools

The resources included in this section of the toolkit focus on teaching as a skill, providing mentors with practicable tips and information about learning styles.

Excerpt taken from the 2008 Edition of the “Cultivating Success Mentor Handbook” developed by Diane Green, Theresa Beaver, and Cinda Williams

One on One Teaching

34 Tips for Teaching

When you have a student-intern, you do need to take the time to explain things to them to give the experience clarity. To create a viable learning experience, the student-intern needs to talk about what they are learning, write about it, relate and apply it to hands-on experience.

The following are some basic principles that are relevant to teaching one on one that may assist you at combining the day-to-day activities on the farm with an educational component.

1. First offer a demonstration of the technique you use to meet the desired outcome. Positive examples are more helpful than examples of what *not* to do.
2. Think about the basics of what is truly important of getting your point across.
Verbal hints that identify key features of the skill will help student-interns understand the desired outcome of the task. They are likely to be distracted by irrelevant details. Keep it simple! You can add details later.
3. ‘Bare bones’, simplified demonstrations are more useful as starting points than complex situations that may overwhelm the intern with too many details.
4. Permit student-interns the maximum freedom to experience successful completion of a task or a part of a task, but give enough guidance so that they will not get bogged down in a rut of errors. This implies that the learning experiences of student-interns go from the simple to the complex, with the steps so ordered that each new problem can be successfully solved. There are no ‘stupid questions’, and it is good to let them know this.
5. Student-interns need practice with feedback.

6. Don't try to correct *everything* on the first trial of a project! Feedback from the farmer-instructor or from peers may provide more information that the student can assimilate.

7. Try to provide some encouraging feedback as well as identification of mistakes.

Of course it is important to point out errors, but be aware of how you make your point so that mistakes are taken constructively.

8. Feedback that identifies errors won't help if the learner doesn't know what to do to avoid the errors. Give guidance about what to try next.

9. Practice with varied examples is likely to be both more motivating than is simple drill and repetition.

10. Coaching is not simply one-way telling and criticizing. Asking the learners about their perceptions of what they are doing and helping them evaluate their own performance is also important. As you evaluate work, verbalize the process you are using and the basis for your evaluation. Like other skills, self-evaluation is learned by practice with feedback. Thus student-interns need many opportunities for self-evaluation with feedback about their evaluation as well as about the work being evaluated.

11. Peers can help one another. You don't need to monitor everyone all of the time.

How can you get your work done and teach?

This is a subject that most of the farmers interested in becoming instructors have asked.

I believe that we need to look at some of the basic principles used in one on one teaching to offer perspectives of how to meet this task as effectively as possible. Initially, with a new intern on the farm, it is going to take more time to explain things and show them how to do specific projects. There are always tasks that take extra care and expertise to accomplish, and these are the tasks that you need to be near by to offer demonstration of the technique. Ideally, the best learning takes place when you first demonstrate the technique, allow the student to show you what they perceive to be the appropriate action; and then work side by side for a period of time to make observations, suggestions, and offer encouragement.

It is important to permit student-interns the maximum freedom to experience successful completion of a task or a part of a task. At the same time, we need to give enough guidance so that they will not get bogged down in a rut of errors. This means that once a task has been given, that you allow time for the intern to have the experience without 'hovering'. Staying nearby in case they have questions can be helpful as well.

As farmers, most of us are very used to doing everything. If you do not take the time to line out several tasks with your interns, they will be returning to ask you "what do I do next?" over and over again.

One way to encourage a self-motivated intern is to have an ongoing list of projects or tasks that are clearly defined and outlined for them to do. This will help you utilize your time more productively and provide alternative projects for your interns without your having to stop so often to show them the way. Granted, at the start up of the season; you are definitely going to spend more time explaining things. By planning ahead, you can give reading assignments that are relative to the next day's project. This will give them a better understanding of the tasks at hand.

There are always daily, basic tasks that need to be accomplished. These are things that may not need close supervision to be accomplished. By making a list of ongoing tasks for your intern to work on, they will be given the opportunity to work independently at times when you simply cannot take the time to stop and explain.

WORKSHEET #5

MENTORING KNOWLEDGE AND SKILLS: SELF-EVALUATION EXERCISES

Section I of this exercise is adapted from guidelines proposed by experienced on-farm mentors to help you complete a self-evaluation prior to elective peer (i.e., mentor-to-mentor) review. It is designed to assist aspiring and practicing mentors in a process of candid self-evaluation. Place a "✓" in the box that most accurately represents your response to each question, with 1= strongly agree and 5= strongly disagree. Then total the number of checks you have made in each column. High numbers in Columns 4 and 5 suggest that planning for improvement is a good idea. *Section II* includes additional questions developed by an experienced on-farm mentor. *Section III* offers an opportunity to assess mentoring aptitude--how comfortable you are in exercising mentoring skills. You may decide to use these models to create your own self-evaluation. Use *Section IV* to create a summary statement of what these exercises have taught you. Keep a record of the results on file and use the outcome to guide your steps toward improvement in deficient areas.

I. Mentoring Knowledge and Skills Self-Assessment

AGREE → DISAGREE

1	2	3	4	5	
					I regularly offer encouragement to learners.
					I foster a positive approach to learning.
					I have strong social skills.
					I am an inspirational mentor.
					I have the ability to clearly communicate expectations.
					I promote teamwork.
					I balance criticism with praise.
					I am reflective.
					I have the ability to assess learner readiness.
					I am accepting of mistakes.
					I am able to turn production problems into learning opportunities.
					I am able to turn "mistakes" into learning opportunities.
					I can accept economic loss as part of trainees' learning process.
					I am willing to learn from trainees.
					I welcome questions.
					My program includes time set aside to check in and/or debrief.
					I am willing to acknowledge my own biases.
					I am willing to ask for help from peers.
					I am effective in managing my own stress.
					I have a procedure for trainees to air grievances or concerns.
					I have a procedure for dealing with problems between trainees.
					I have a procedure for firing trainees.
					I offer support to trainees after they leave my farm.
					All in all, I feel confident about my mentoring knowledge and skills.
					Total

WORKSHEET #5 (PAGE 2)

**MENTORING KNOWLEDGE AND SKILLS:
SELF-EVALUATION EXERCISES (CONT'D)**

II. Mentoring Skills Questionnaire

1. Do I give time for trainees to air their concerns and questions about non-farming matters on a regular basis?
2. Do I have a procedure for dealing with trainee-to-trainee disagreements or conflicts? If so, do I make this procedure clear at the first sign of trouble? Before trouble arises?
3. How did I develop this procedure (e.g., in consultation with other farmers hosting trainees, from books, from talking to a counselor)?
4. Do I make it easy or difficult for trainees to voice concerns about MY behavior?
5. Do I generally discourage gossip and “ganging up” behaviors? Do I warn trainees about this at the beginning of the season? Do I watch for it as the season progresses?
6. If I have a hasty temper, do I;
 - a. Inform trainees about it ahead of time and explain that I am working on it?
 - b. Have a system for dealing with it (e.g., alone time, going fishing, exercising)?
7. Do I have a procedure for airing grievances about trainees’ behavior?
8. Do I have a procedure for firing a trainee?
9. Do I take time to talk to trainees about their vocational plans?
10. Do I offer trainees guidance regarding their plans for the future? Do I recommend trainees to colleagues who could help them progress in their education or vocation?
11. Do I offer “free” consulting to trainees after they leave my farm?

WORKSHEET #5 (PAGE 3)

MENTORING KNOWLEDGE AND SKILLS: SELF-EVALUATION EXERCISES (CONT'D)

III. Assess your Mentoring Comfort Level

Many excellent teachers find that the mentoring role is challenging. Creating the nurturing environment that successful mentoring requires doesn't come naturally to everyone. This exercise is designed to help you assess whether or not you are likely to feel comfortable in the role of mentor. Begin by indicating how comfortable you feel when using each of the listed mentoring skills: place a "✓" in the appropriate column. Then make a note to remind yourself why you feel this way (see example). In the final column, state whether or not you will need to work on becoming more comfortable about exercising this mentoring skill.

Very comfortable → Uncomfortable

Skill	1	2	3	4	5	For Example	Needs Work
1. <i>Discovering trainees' needs and desires</i>	X					<i>I have a relaxed and thorough interviewing style</i>	
1. Discovering trainees' needs and desires							
2. Building and maintaining relationships							
3. Coaching							
4. Communicating							
5. Encouraging							
6. Facilitating trainees' overall farm experience							
7. Setting goals with trainee							
8. Guiding trainees' skills acquisition							
9. Managing conflicts with trainees							
10. Problem solving with trainees							
11. Providing and receiving feedback							
12. Reflecting							
13. Other							

Adapted from Mentor Project training material presented by Tina Overtom, TOSU CETE/SCID facilitator

An excerpt from "The On-Farm Mentor's Guide: Practical Approaches to Teaching on the Farm," written by Miranda Smith and published by New England Small Farm Institute

WORKSHEET #3

TEACHING KNOWLEDGE AND SKILLS: SELF-EVALUATION EXERCISES

Section I of this exercise is adapted from guidelines proposed by experienced on-farm mentors to help you complete a self-evaluation prior to elective peer (i.e., mentor-to-mentor) review. It is designed to assist aspiring and practicing mentors in a process of candid self-evaluation. Place a "✓" in the box that most accurately represents your response to each question, with **1= strongly agree** and **5= strongly disagree**. Then total the number of checks you have made in each column. High numbers in Columns 4 and 5 suggest that planning for improvement is a good idea. *Section II* includes additional questions developed by an experienced on-farm mentor. Use *Section III* to create a summary statement of what these exercises have taught you. Keep a record of the results on file and use the outcome to guide your steps toward improvement in deficient areas.

I. Teaching Knowledge and Skills Self-Assessment

AGREE → DISAGREE

1	2	3	4	5	
					I have conducted a self-assessment to determine topic areas of personal unfamiliarity/weakness, and I regularly ask another farmer or subject matter expert to teach this material.
					I use sound teaching methodology.
					I provide comprehensive task analyses and lesson plans.
					I have a good understanding of different learning styles and of the needs and interests of "adult learners."
					I prepare learning exercises and/or reading assignments to augment in-class or on-field instruction.
					I have a systematic approach to teaching hands-on skills.
					I am able to communicate effectively and to clearly articulate ideas.
					I am teaching at an appropriate level or stage of expertise.
					All in all, I feel confident about my teaching knowledge and skills.
					Total

TEACHING KNOWLEDGE AND SKILLS: SELF-EVALUATION EXERCISES (CONT'D)

II. Teaching Knowledge and Skills Questionnaire

1. When teaching conceptual material, do I:
 - a. Assess and accommodate various learning styles?
If so, describe and give examples.
 - b. Work from trainees' "known" information or material that I have already covered?
 - c. Draw analogies from everyday life whenever possible?
 - d. Break a large topic into smaller pieces to be presented and assimilated in series?
 - e. Review material from the last lesson prior to introducing new material?
 - f. Solicit questions?
 - g. Give assignments or suggestions for ways to study and master the material in question?
 - h. Describe how the material relates to farming activities?
 - i. Give frequent evaluation tests to determine if trainees are learning the material?
 - j. Go over material that trainees do not understand until they have grasped and can apply it?
 - k. Develop exercises to challenge the trainee to apply the material in a new contest?
 - l. Praise or acknowledge trainees when they learn new material or apply it in a new way?
2. When teaching hands-on skills, do I:
 - a. Assess and accommodate various learning styles? If so, please describe.
 - b. Break hands-on tasks into discrete steps?
 - c. Communicate how to do each step of the task in words?
 - d. Demonstrate each step slowly enough to show the fine points?
 - e. Watch the trainee carry out each step before giving guidance—unless the apprentice is placing someone or something in danger—so that the trainee has adequate time to self-correct?
 - f. Think of other ways to describe or demonstrate a task if the trainee can't "get it" the first time?
 - g. Explain the correspondence between the task and relevant theoretical, or "class room," information?
 - h. Teach safety precautions about machinery, equipment, and using the body at the beginning of each new task?
3. Am I happily willing to teach the same material several times over, not necessarily on the same day?
4. What is the limit of the times I will teach the same thing over again?
5. Have I prepared or acquired written materials for each appropriate curriculum block?

WORKSHEET #3 (PAGE 3)

TEACHING KNOWLEDGE AND SKILLS: SELF-EVALUATION EXERCISES (CONT'D)

II. Teaching Knowledge and Skills Questionnaire (CONT'D)

6. Have I prepared or acquired resource lists and bibliographies for each appropriate curriculum block?
7. Do I have these materials available at the farm?
8. Have I assessed the areas in which I am weak enough so that trainees would profit from learning from another farm mentor?
9. Have I developed arrangements with other farm mentors to share teaching responsibilities?
10. Do I teach safety precautions about machinery, equipment, and using the body at the beginning of each new task?
11. Have I set aside clean, quiet space for a classroom?
12. Have I created a schedule for on-farm classroom instruction as well as individual study time?
13. Have I prepared a learning contract template that can be modified for each trainee? Do I use this template?
14. Have I prepared evaluation forms for each curriculum block and do I administer them?
15. Do I give trainees written evaluations throughout the season?
At the end of the season?

III. Teaching Self-Assessment Comments:

*Excerpt taken from the 2008 Edition of the “Cultivating Success Mentor Handbook”
developed by Diane Green, Theresa Beaver, and Cinda Williams*

Adult Learning Styles

Learning Styles Primer for Farmer Mentors

You are now considering the possibility of mentoring a future farmer; taking an intern under your wing; and inviting someone to come to your farm to observe, listen and do. There are many expectations on your side and also many on the part of the individual who is interested in this learning opportunity.

The Cultivating Success program is aimed at providing a successful learning and growing experience for both farmer and intern. Learning is emphasized because this internship is more than a job. Your intern will be a student of farming. The objective is to learn how to plant, water, build the soil, raise animals, market, etc. This puts you (the experienced farmer) in the position of the teacher. Not only are you a teacher but you will also be doing more one-on-one instruction than most school or university instructors ever experience. In addition, you will have a personal relationship with your student. More than likely your student will have a very different personality and learning style than you do.

Knowing something about different learning and teaching styles will ease the process between you and your intern. It does not mean that you will have the student take a test and then try to structure all your learning activities to meet the students learning style. It is merely to give you a better sense of the different learning styles so you are more sensitive to your own style and others. In fact, no matter where we fall in our dominant or preferred learning style, we all learn in a number of ways. The most successful educational endeavors are those that provide a variety of different learning experiences.

There are numerous types of theories and methodologies regarding learning styles, personality characteristics and intelligence types. These evaluative models give us a general way to categorize people according to how they view the world and learn from it. As most of the literature on these learning styles points out, this is not to pigeonhole people. However, it may provide tendencies that are useful in helping the educational process. It may also provide new insight into the fact that we are all very different. Having this understanding might provide the necessary patience it takes to make this a win-win situation between teacher and student.

Another reason for you as a farmer mentor to look at different learning styles is for your own personal benefit. It might provide insight into the teaching/leading methods that are most comfortable for you. You might also find it useful information for improving communication skills or in working with teams.

How Do We Learn?

There are numerous theories of assessing learning tendencies or styles. One of the most recognized learning theories is based on the work of David Kolb. Kolb and others have looked at learning as a scientific process as well as a way to evaluate effective learning and teaching strategies.

Kolb's Experimental Learning Theory

Kolb's four-stage theory of learning is based on a model with two dimensions (see Figure 1). The first dimension is represented by the horizontal line and is based on the "tasks." At one extreme is the Active Experimentation phase (doing) and at the other end is the reflective observation phase (watching). The second dimension is based on our thought and emotional processes and runs vertical. At the top of this dimension we have the concrete experience phase (feeling) and at the bottom we have the abstract conceptualization (thinking) phase. These four phases of the learning process are described below with information that relates to preferred educational activities for different learner types:

- **Feeling or Sensing** (*Concrete Experience*) - This dimension represents a receptive experience based approach to learning that relies on feeling based judgments. Learning is most effective from specific examples in which they can be involved. This phase of learning relies more on peers, not authority. Theoretical readings are not always helpful while group work and peer feedback often leads to success. Planned activities should apply learned skills. The instructor acts as coach/helper for this self-directed autonomous learner.
- **Watching** (*Reflective Observation*) – This phase is based on careful observation in making judgments. Preferred learning situations include lectures that allow the role of impartial objective observer. Lectures are helpful to this learner as they are often visual and auditory learners. This learner wants the instructor to provide expert interpretation. They look for an instructor who is both a taskmaster and a guide.
- **Thinking** (*Abstract Conceptualization*) - Oriented towards things and symbols, and less towards other people. Prefer to be in authority-directed, impersonal learning situations that emphasize theory and systematic analysis. Learners at this phase are

frustrated by and gain little from unstructured "discovery learning" approaches such as exercises and simulations. Case studies, theoretical readings and reflective thinking exercises help this learner.

- **Doing** (*Active Experimentation*) - Individuals in this phase learn best when they can engage in such things as projects, homework, or group discussions. They dislike passive learning situations such as lectures. This learner wants to touch everything (kinesthetic or tactile). Problem solving, small group discussions or games, peer feedback, and self directed work assignments all help this learner. This learner likes to see everything and determine their own criteria for the relevance of the materials.

Pragmatists (Feelers) like to learn using *abstract conceptualization* and *active experimentation* (laboratories, field work, observations). Training approach: peer feedback and activities that apply skills. They prefer to deal with things rather than people.

Activists (Doers) like to learn using *concrete experience* and *active experimentation* (simulations, case study, homework). Training approach: practicing the skill, problem solving, small group discussions, and peer feedback. They are called accommodators because they excel in adapting to specific immediate circumstances. They tend to solve problems intuitively, relying on others for information.

An excerpt from "The On-Farm Mentor's Guide: Practical Approaches to Teaching on the Farm," written by Miranda Smith and published by New England Small Farm Institute

WORKSHEET #2

LEARNING STYLES—MODALITY PREFERENCE INVENTORY

Middlesex Community College, Middletown, CT

Mark down the appropriate response to each item as it applies to your experience. Add up your score to make an assessment of your learning style(s) or preferences.

3 – Often

2 – Sometimes

1 – Seldom/Never

Visual Modality

- ☐ I remember information better if I write it down.
- ☐ Looking at the teacher helps keep me focused.
- ☐ I need a quiet place to get my work done.
- ☐ When I take a test, I can see the textbook page in my head.
- ☐ I need to write down directions, not just take them verbally.
- ☐ Music or background noise distracts my attention from the task at hand.
- ☐ I don't always get the meaning of a joke.
- ☐ I doodle and draw pictures on the margins of my notebook pages.
- ☐ I have trouble following lectures.
- ☐ I react very strongly to colors.
- ☐ **Total**

Auditory Modality

- ☐ My papers and notebooks always seem messy.
- ☐ When I read, I need to use my index finger to track my place on the line.
- ☐ I do not follow written directions well.
- ☐ If I hear something, I will remember it.
- ☐ Writing has always been difficult for me.
- ☐ I often misread words from the text, for example, "them" for "then."
- ☐ I would rather listen and learn than read and learn.
- ☐ I'm not very good at interpreting an individual's body language.
- ☐ Pages with small print or poor quality copies are difficult for me to read.
- ☐ My eyes tire quickly, even though my vision check-up is always fine.
- ☐ **Total**

Kinesthetic/Tactile Modality

- ☐ I start a project before reading the directions.
- ☐ I hate to sit at a desk for long periods of time.
- ☐ I prefer first to see something done and then to do it myself.
- ☐ I use the trial and error approach to problem-solving.
- ☐ I like to read my textbook while riding an exercise bike.
- ☐ I take frequent study breaks.
- ☐ I have a difficult time giving step-by-step instructions.
- ☐ I enjoy sports and do well at several different types of them.
- ☐ I use my hands when describing things.
- ☐ I have to rewrite or type my class notes to reinforce the material.
- ☐ **Total**

To complete the exercise, assign a ranking to each item and total the score for each section. A score of 21 or more points in a modality indicates strength in that area. The highest of the 3 scores indicates the most efficient way to learn. The second highest score indicates the modality that boosts the primary strength. For example, a score of 23 in the visual modality and a score of 19 in the auditory modality indicate a strong visual learner whose comprehension and retention is boosted by auditory learning tools.

Evaluation Tools

Excerpt taken from the 2008 Edition of the “Cultivating Success Mentor Handbook” developed by Diane Green, Theresa Beaver, and Cinda Williams

The Evaluation Process

Introduction to Evaluations

One way to improve and empower the educational process is to use evaluations as a tool for discussion and feedback with interns as well as with instructors.

In a classroom situation, the exam is one way to determine the level of comprehension of a topic. Instructors can evaluate by class discussion, student notes, and individual conferences outside of the classroom. In the field, on the farm, away from the classroom, the options change.

It seems obvious that students must give some interest and attention to their work in order to learn, and student reactions are therefore valuable. We have created a couple of outlines for evaluations of interns that may help facilitate clear communication about specific topics for discussion with their Farmer Mentor.

We have also included an evaluation for the intern to assess the Farmer Mentor as an instructor. Student evaluation of instruction is a relatively direct method of obtaining this information. This is one way for the instructor to improve on their teaching techniques. The Farmer Mentor can use this evaluation to improve the quality of the education on the farm.

These assessments should not be used as the single measure of teaching. Rather we should think of them as data valuable for problem solving.

These evaluation forms may need to be reexamined and revised to best meet the needs of your specific project as well.

MONTHLY INTERN EVALUATION

(To be filled out by farmer)

Name of Intern _____ Date _____

Farmer Mentor _____ Farm Name _____

Select the choice that best applies to intern:

1. Quality of Work

___Above Average ___Average ___Needs Improvement ___Not Observed

2. Listens & responds to directions

___Above Average ___Average ___Needs Improvement ___Not Observed

3. Completes work assignments as directed

___Above Average ___Average ___Needs Improvement ___Not Observed

4. Willingness to work required schedule

___Above Average ___Average ___Needs Improvement ___Not Observed

5. Takes initiative to work independently without supervision

___Above Average ___Average ___Needs Improvement ___Not Observed

In the space provided below, please evaluate intern monthly progress:

What would you do differently?

How well is it working?

Other Comments:

MONTHLY OR END OF SEASON INTERN EVALUATION

(To be filled out by farmer monthly or end of season: *circle one*)

Name of Intern _____ Date _____

Farmer Mentor _____ Farm Name _____

Describe in what ways Intern:

1. Listens and responds to directions?
2. Completes work assignments as directed?
3. Performs work in a careful manner?
4. Assumes responsibility and learns from own mistakes?
5. Willingness to work required schedule?
6. Absence record?
7. Consider general efficiency and consistency of work?
8. Takes initiative to work independently without supervision?
9. Other comments:

FARMER MENTOR EVALUTATION
(To be filled out by intern at end of season)

Farmer Mentor: _____ Farm Name: _____

Assess farmer mentor using the following topics:

1. Were directions given clearly?
2. Were appropriate tools supplied?
3. Safety conditions?
4. Atmosphere of working environment?
5. Atmosphere of living environment?
6. Content and usefulness of information?
7. Practical information and applications?
8. Willingness to discuss different ideas and answer questions?
9. Why did you choose to accept this internship?
10. Has it met your expectations?
11. Suggestions for improvements?
12. What do you consider strengths and/or weaknesses of the internship program?

Intern signature _____ Date: _____

Thank you for taking the time to fill out this evaluation!

An excerpt from "The On-Farm Mentor's Guide: Practical Approaches to Teaching on the Farm," written by Miranda Smith and published by New England Small Farm Institute

WORKSHEET #6

TRAINING PROGRAM EVALUATION

Section I of this exercise is adapted from guidelines proposed by experienced on-farm mentors to help you complete a self-evaluation prior to elective peer (i.e., mentor-to-mentor) review. It is designed to assist aspiring and practicing mentors in a process of candid self-evaluation. Place a "✓" in the box that most accurately represents your response to each question, with 1= **strongly agree** and 5= **strongly disagree**. Then total the number of checks you have made in each column. High numbers in Columns 4 and 5 suggest that planning for improvement is a good idea. *Section II* includes additional questions about program delivery developed by an experienced on-farm mentor. Use *Section III* to create a summary statement of what these exercises have taught you. Keep a record of the results on file and use the outcome to guide your steps toward improvement in deficient areas.

I. On-Farm Training Program Evaluation

AGREE → DISAGREE

1	2	3	4	5	
					I have a comprehensive training plan.
					I fully disclose information about my farming practices and level (e.g., number of years I have farmed) to trainees.
					I offer a comprehensive orientation program.
					I develop a comprehensive learning contract with each trainee.
					I offer training at the following levels of experience: none ____ one year ____ two-plus years ____, and believe that this properly reflects my own level of expertise.
					I involve trainees in planning farm operations.
					My budget covers the costs of trainee mistakes.
					I offer trainees time for reflection.
					I schedule regular "check-in" periods with trainees.
					I conduct a mid-season review process.
					I conduct an end-of-season review.
					I offer an adequate collection of learning materials.
					My classes are scheduled on a regular basis (i.e., not somewhat sporadic).
					I offer off-farm learning opportunities.
					I provide trainees with a clearly defined vacation slot.
					I provide a clearly defined work schedule.
					I offer training in domestic farm-life skills such as food preservation as well as in production skills.
					I give examinations or evaluations during the season and/or at the end of the season. For example:
					I ask trainees to evaluate the training they have received.
					All in all, I feel confident about my training program.
					Total

Legal Considerations

Bringing a trainee onto the farm brings with it a number of legal ramifications. The resources included in this section of the toolkit aim to help potential mentors navigate labor laws, liability insurance, workers compensations, and housing regulations. These resources should not be construed as legal advice and farmers are responsible for finding and complying with state and federal laws governing on-farm labor. Many of the resources in this section of the toolkit are generally applicable to the United States, though some resources especially around minimum wage laws, agricultural labor exemptions, and taxes are state specific and are included as an example of how state law governs on-farm labor. Potential mentors should seek out information from their State Department of Agriculture, Department of Labor, and/or other relevant local agencies in order to find out what regulations apply to their farm and mentoring program.

Excerpt taken from the Washington State Department of Agriculture “Labor on the Farm Factsheet”

Labor on the Farm

January 2010

Running a Successful Farm Business

Labor laws can be a challenge to understand, especially given the seasonal and familial nature of farm work. The following information and regulations are for every classification of worker you might have on your farm. As an employer, farms have legal responsibilities when hiring employees, interns, apprentices and volunteers.

In this fact sheet, you will find information on:

- managing people;
- labor laws for interns;
- labor laws for apprentices; and
- labor laws for volunteers.

Managing People

For any size of business or farm, it is a good idea to have a plan for managing employees, volunteers, interns, and even other family members. Although there may be implicit roles built up over a lifetime of working together, creating a more formalized management plan becomes increasingly useful when new people are added to the farm business.

Management plans build understanding about why and how decisions are made, and clarify exactly what each person's responsibilities will be on the farm. By sharing ownership in the outcomes, employees are better able to understand the big picture and focus on the right priorities. Formal management plans and employee manuals may also help in securing funding, abiding by legal requirements with employees, and improving on-farm safety.

There are many ways to approach how to manage everyone working on or with your farm. If you are just getting started, there are seven key processes to focus on:

- create written job descriptions and an overall plan for how each job fits into the whole;
- create clear hiring protocols;
- provide an orientation to your farm and the job as well as ongoing training (informal and formal);
- develop clear employer/employee communication, including a written grievance policy;
- schedule times to review job goals and performance;
- clarify compensation and check related laws; and
- schedule times to review your management plan to keep it updated and relevant.

Managing people is a real skill and can be real work. However, having a productive team and avoiding personnel tension and even possible legal issues is a real benefit in the long run.

Labor and Industries Requirements

L&I requires certain workplace posters to be posted for employees. A list of workplace posters required and recommended by L&I, other Washington State and federal agencies is available at www.lni.wa.gov/IPUB/101-054-000.pdf. All posters are free and available in both English and Spanish. Be aware that private companies will try to sell these to you.

L&I requires that employers maintain records of employees for three years. Records must include: employee name and address, occupation and L&I job classification, dates of employment, amount paid each pay period, wage rate or rates of pay, and total hours worked each pay period, and termination date and cause. These records are subject to audit.

L&I conducts workshops around the state designed for new businesses or businesses that plan to hire workers for the first time. It explains an employer's rights and responsibilities and provides an overview of the services and resources available at Labor and Industries. It also covers workplace safety and health requirements, claims management strategies, risk management, quarterly reporting requirements and wage-and-hour laws. For complete information, please visit L&I online at www.lni.wa.gov or call (800) 574-2829.

L&I also has a webpage that leads new businesses or new employers through all of the needed information and steps at www.lni.wa.gov/Main/RunBusiness.asp or download the form available online called the **Farm Labor Employer Packet** at www.lni.wa.gov, or call the Washington State Department of Labor and Industries Employer Help Line at (360) 902-5316.

Providing a Safe Workplace for Your Employees

As an agricultural employer with one or more employees you are responsible for following guidelines and statutory requirements in order to maintain a safe workplace. There are specific workplace standards and reporting provisions with which an employer must comply. Details can be found on the L&I website under several different headings pertaining to on the job safety.

You may want to request a safety and health consultation from L&I. A consultant, not an inspector, will meet with you and conduct a walkthrough survey of your worksite to identify hazards and recommend remedies. You must correct in a timely manner any serious hazards found during the consultation, but the consultant will not issue a citation or fine you.

To learn about the safety standards for agriculture and resources available for employee safety and health trainings visit

www.lni.wa.gov/safety/topics/atoz/default.asp?KWID=353. The WISHA rules are available in English or Spanish, through the L&I website at www.lni.wa.gov/WISHA/Rules/agriculture/default.htm.

Payroll Taxes

Employers are required to withhold federal income, Social Security and Medicare taxes from employees' wages. Employers are also required to pay worker's compensation and state unemployment insurance. For more information, on your payroll responsibilities please see the Fact Sheet on Taxes.

Labor Laws for Interns

An intern must be registered in an internship program at an accredited educational institution such as a college, community college, or university where a student pays the school and receives academic credit.

An internship allows an employer to be exempt from:

- paying wages; and
- paying unemployment insurance tax through state Employment Securities (ESD) and federal (FUTA).

An internship still requires that an employer:

- provide a safe workplace.

Washington Labor and Industries premium for workers compensation insurance that covers on the job injuries can be paid by the educational institution sponsoring the internship.

Labor Laws for Apprentices

The term "apprentice" is an employment classification with a formal structure set by federal and state law. The business employing the apprentice designs a personalized program that must be proposed to and approved by the Washington State Apprenticeship Council (a division of L&I).

In order to have apprentices, you must follow these legal requirements:

- Have an Employer's Identification Number (EIN);
- Pay at least minimum wage with raises based upon demonstrated competencies;
- Pay Washington Labor and Industries premium for workers compensation insurance that covers on the job injuries;
- Pay Unemployment insurance tax through state Employment Securities(ESD) and federal (FUTA);

- Provide a safe workplace for your employees; and
- Provide 144 hours of pre-planned instructional time per year.

While there is no cost to register an apprenticeship program, it does take time. Plan for three to six months to create, register and approve an apprenticeship program.

The employer benefits from apprentices by building long-term labor support and training someone from the beginning with their knowledge and techniques. As a Washington State registered apprentice, an apprentice will receive a 50% tuition waiver at a Washington State community or technical college.

To create an apprenticeship program you will need to be either a farm, group of farms or trade organization.

Registered apprenticeship programs start with the formation of an apprenticeship committee. Committees develop program guidelines that include:

- Criteria for becoming an apprentice
- Skill and proficiency requirements to reach journey worker/professional level
- Number of apprenticeship openings
- Wage rates and progressions based upon demonstrated competencies
- Required course curriculum to complement on-the-job training
- Supervision methods
- Equal opportunity procedures

For a fact sheet on full apprenticeship requirements visit www.lni.wa.gov/TradesLicensing/Apprenticeship/files/pubs/RegisteredApprenticeshipemployersfactsheet.pdf. Or for a local apprenticeship consultant go to: www.lni.wa.gov/TradesLicensing/Apprenticeship/About/AppCoordinators/default.asp, or call (360) 902-5320.

Labor Laws for Volunteers

According to L&I rules, volunteers are not allowed in a “for-profit” business.

Employers must follow all state employee guidelines for people seeking to trade, barter or volunteer on their farm. Arranging for volunteer agricultural workers through established exchange programs does not exempt an employer from these requirements.

There are only two programs through L&I for volunteers that are not required to meet all other state employee guidelines. One is the Sports Teams and Youth Workers program and the other more applicable to farms is the K- 12 Student Volunteers program for which information can be found at <http://lni.wa.gov/FormPub/Detail.asp?DocID=1560>. This can apply to 4-H projects.

For complete information about employment standards and workplace rights, contact L&I at (866) 219-7321.

Addressing Liability Insurance Concerns

Excerpt taken from the 2008 Edition of the “Cultivating Success Mentor Handbook” developed by Diane Green, Theresa Beaver, and Cinda Williams

Perhaps you already have some insurance. What type of coverage do you need? There is no specific answer to this question because not all businesses or farming situations are alike. Insurance is a necessity in most businesses. The standard advice is to only insure against what you can't afford to lose. None of us can afford to lose the farm; therefore it is extremely important to have insurance protection.

In most cases, insurance is required as a condition for a bank loan. In a sole proprietorship, adequate insurance is critical because you are personally liable for all debts. Having adequate insurance is one way to manage this possible risk of being personally liable for your business' default on loans.

Many business owners naively believe their business doesn't need insurance. Even in the case of home-based businesses, thinking your homeowner's policy will cover any business loss is a huge mistake. The activities of your home office are not likely to be insured by your homeowner's policy unless you have a special "rider" on that homeowner's policy or have separate home office coverage.

Ask your insurance agent to look at your present coverage to analyze what additional areas of risk your business exposes you to and recommend the types and amounts of insurance your business requires. Make a list of all of the business activities that you have on going at your farm to include things like farm tours, interns, workshops, and value added products etc. and share these with your agent.

Property and liability are the most important types of insurance for businesses. A property policy provides insurance on your building and other physical assets. Liability protects you against claims of injury or property loss resulting from negligence on your part. Life and health coverage is primarily seen as part of an employee benefit package.

Liability Insurance

Liability insurance protects your business if for example; someone suffers a bodily injury while on your site and sues you for damages. Your insurance policy should cover your costs for these damages. Many policies will also cover injuries like libel and slander (if you are in the

publishing business, for instance). The cost of liability insurance is generally related to the risk of your industry. As an agricultural business, your cost may depend upon what you produce on your farm and how you produce it, and whether or not your operation is open to the general public.

Liability for the acts of animals kept as pets or part of the farm operation is another area specific to agricultural business. For example, legal liabilities may arise if your cattle get into your neighbor's cornfield or they cause a car accident while they are crossing the road. Perhaps a horse or a goat bites someone while visiting the farm; these are things to consider when you have farm visitors.

Product Liability

Product liability insurance protects you against injury or property loss due to a product defect or design flaw, this list includes farm machinery, livestock products and food products.

Professional Liability

Professional insurance protects people whose business involves services or consulting. People who are self-employed often need professional liability insurance to protect both their personal and business interests. Perhaps other farmers hire you to advise on production planning, for example, and pay you for that service. Find out from your insurance agent if that activity exposes you to any special liability issues.

Workman's Compensation Insurance and State Laws

Workers' Compensation Insurance covers employees medical and rehabilitation costs and lost wages for employees hurt on the job. It is required by law in every state. Requirements and rates vary by state. We want to be sure that the farmers involved with this farmer-mentor program are protected from liability and adhering to the workman's compensation laws.

Interns must be registered as either academic or CEU students at a cooperating university in order to not be considered employees. In the states of Idaho and Washington, it is considered illegal to have someone work on your farm, even in an educational setting, if s/he is not being paid. A student earning credit from an accredited institution is exempt and legal, which is why Cultivating Success requires that all interns register for credit.

*Excerpts from NXLevel's Tilling the Soil of Opportunity Course Materials (www.nxlevel.org)

An excerpt from "The On-Farm Mentor's Guide: Practical Approaches to Teaching on the Farm," written by Miranda Smith and published by New England Small Farm Institute

Chapter 3.2

The Business End of On-Farm Mentoring

Good businesspeople have several traits in common. As employers, they tend to be even-handed and well organized. They are excellent supervisors, teach their employees while giving work directions, and motivate their employees to do an ever more competent job. They also keep up with the administrative tasks associated with being a business manager and/or owner and they make sure that their businesses are in compliance with all relevant laws, regulations, and codes. But none of us is born knowing how to do all this and some people prefer to hand on aspects of the business responsibility. No matter what tasks you do yourself or delegate to others, your farm business always deserves the highest possible quality of administrative care.

Chances are that you already shoulder many administrative responsibilities as an owner/operator or manager of your farm. But once you take on trainees, you take on another role—that of agricultural employer. This can come as a surprise to people who think of themselves as on-farm mentors who offer education in exchange for labor. Many farmers have operated under this misunderstanding for years. However, if your trainees do any work that benefits your farm business, they are employees in the eyes of government. This determination is made on the basis of what they do—not on what you call them. Your choice of job title—intern, apprentice, journey person, willing worker, or otherwise—has no bearing on the law. When your trainees are in a class or are participating in hands-on skills instruction, it's fair to consider them trainees, not hourly wage earners. But the minute someone begins to perform work that contributes to your farm's bottom line, he or she goes back on the clock as your employee.

Judith Gillan, one of the founders of NESFI, likens this to training cashiers at a supermarket. “New employees get their training on a dummy cash register in a back room and aren’t considered employees during that time. But as soon as they touch a cash register in the front of the store, they go on the clock as employees.”

YOUR RESPONSIBILITIES AS AN EMPLOYER

By law, employers have certain responsibilities to their employees and also to state and federal governments. Unless you are exempt from particular laws and their amendments, as discussed below, your responsibilities as an employer mean that you must:

- Keep detailed personnel records for each employee.
- Pay employees at the federal minimum wage rate or state agricultural minimum wage rate.
- Withhold federal and, when applicable, state income taxes from employees’ pay.
- Withhold social security and Medicare payments from employees’ pay and match them with the employer’s share.
- Pay state unemployment taxes.
- Detail all amounts withheld from employees’ pay.
- Submit payment of these monies to the appropriate agencies, along with the proper forms.
- Pay overtime to any employee who performs any non-agricultural labor during the week.
- Pay state Workers’ Compensation Insurance.
- Comply with relevant provisions of:
 - The Fair Labor Standards Act of 1938.
 - The Migrant and Seasonal Agricultural Workers Protection Act of 1983.
 - The Occupational Standards and Health Act of 1970.
 - The Federal Insecticide, Fungicide and Rodenticide Act of 1947, its Worker Protection Standard, and as amended by the Food Quality Protection Act of 1996.
 - The Equal Pay Act of 1963.
 - The Civil Rights Act of 1964.
 - The Age Discrimination in Employment Act of 1967.
 - The Immigration Reform and Control Act of 1986.
 - The Americans with Disabilities Act of 1990.
 - The Family and Medical Leave Act of 1993.
 - The Personal Responsibility and Work Opportunity Reconciliation Act of 1996, known as the “Welfare Reform Law,” and its New Hire Reporting Program.
 - State and Federal Tax Laws.

An excerpt from “The On-Farm Mentor’s Guide: Practical Approaches to Teaching on the Farm” published by the New England Small Farm Institute

Just looking at this list may discourage you, not only because you feel you can't afford to pay federal or state agricultural minimum wages, but also because you can't imagine taking the time to learn about and comply with all of the pertinent laws. There is no doubt that your paperwork will increase as a consequence of becoming an employer, but thanks to certain exemptions and creative ways of planning your farming systems and schedules, your actual costs may not.

PERSONNEL RECORDS

By law, employers are required to keep certain records about each employee. Create a file for each person and put the following information into it:

- Name, home address, and home phone.
- Social Security number.
- Employment Agreement, as described on page 122.
- Federal Form I-9, Employee Eligibility Verification, along with photocopies of the two pieces of identification—birth certificate, social security card, driver's license, passport—that establish your employee's identity and eligibility to work in the U.S.
- Form W-4.
- Documents supporting your compliance with state New Hire Reporting Program requirements, in accordance with the "Welfare Reform Law." To comply with this law, you must report the name, address, and federal employment number, or social security number, to the state child support agency designated to gather and process this information. Check with the appropriate agency in your state to learn where you should send this information and when it is due.
- Payroll records.
- Personnel Guidelines for your farm business. Ask your employee to sign a statement attesting to the fact that he or she has received a copy and has reviewed it.
- Resume or CV.
- Learning Contract, as described on page 122.

You can download the I-9 form at: <http://uscis.gov/graphics/forms-fee/forms/I-9.htm>, and the W-4 at: www.irs.gov/formspubs. For a list of approved documents and their specified uses, check: <http://www.usda.gov/oce/oce/labor-affairs/ircasumm.htm#Requirements>.

An excerpt from "The On-Farm Mentor's Guide: Practical Approaches to Teaching on the Farm" published by the New England Small Farm Institute

Payroll records. No matter whether you pay your trainees in cash or “in kind,” and no matter whether you call it a stipend, a bonus, or a wage, you’ll need to keep some records about their compensation. As discussed below, some farmers are exempt from certain recordkeeping requirements. However, it’s best to err on the side of caution and keep good records as a matter of course. Remember that if an exemption is ever challenged, the burden of proof lies with the employer, not the employee. The full list of required records includes:

- Time sheets for each employee.
- Amounts you withheld for state and federal income tax and Social Security/Medicare payments.
- Copies of the forms that accompany these payments—and the employer’s share—when you send them to the appropriate agencies.
- Workers’ Compensation Insurance payments and paperwork.
- Unemployment Insurance payments and paperwork.

STATE WORKERS’ COMPENSATION INSURANCE

All states have Workers’ Compensation laws. These laws ensure that employees who are injured or disabled while on the job receive monetary compensation and that dependents of workers who are killed because of work-related injuries or illnesses receive benefits. In some states, Workers’ Compensation laws limit the amount an injured employee can recover from an employer as well as eliminate co-workers’ liability in most accidents. But laws differ from state to state, and some states also make special provisions for agricultural employers, so it’s important to learn about your own state’s laws.

Carrying Workers’ Compensation Insurance is compulsory in most, but not all, states. The table on page 136, “Northeast States in which Worker’s Compensation Laws Apply to Farmworkers” gives an overview of the requirements in various northeastern states.

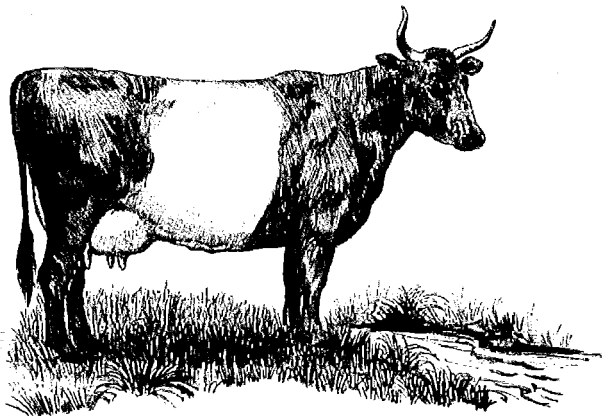
You may discover that you must provide Workers’ Compensation Insurance for all of your employees. If this is so, you should know that you are committing a felony if you don’t provide it. But even if you discover that it’s not compulsory in your state, there are compelling reasons to carry it.

An excerpt from “The On-Farm Mentor’s Guide: Practical Approaches to Teaching on the Farm” published by the New England Small Farm Institute

Remember that workers fought long and hard for this benefit. Without it, an employee has no recourse if he or she is severely injured on the job and does not carry personal insurance that will pay medical or disability costs. Not only does Workers' Compensation Insurance cover traumatic injuries and disabilities, it also covers those that have a gradual onset, such as stress-related disorders or repetitive motion injuries, and provides benefits for medical costs, temporary disability, vocational rehabilitation, and death. Given that farms are one of the places where accidents are most likely to happen—even if you are extraordinarily careful and watchful—it only makes sense to protect your workers and trainees, as well as yourself and your family, by carrying it.

Some people assume that their trainees would never sue for damages. However, you should be aware that this decision isn't always up to the injured person. His or her family, a private insurance company, or even the hospital or attending doctor could hold you liable for all costs and sue you for damages above and beyond those costs.

Note, too, that this is an area that is now receiving increased governmental attention. In 2004, for example, a number of Hmong farmers in California were fined because they did not provide Workers' Compensation Insurance for extended family members who were helping out on their farms. The fines ranged from \$14,500 to \$25,000—a cost well beyond that of the insurance. These farmers, all immigrants, were ignorant of the law. Nonetheless, it applied to them. So even if you don't think you need to carry Workers' Compensation, you might want to consider doing so.



Northeast States in which Workers' Compensation Laws Apply to Farmworkers

State	Farmworkers	Coverage Type
CT	Agricultural workers are covered the same as all other employees.	Compulsory
DE	Agricultural employees whose employer carries insurance to provide coverage for such workers or their dependents. Farm workers are not covered if they earn less than \$750 in any 3-month period.	Compulsory
ME	Agricultural workers, except seasonal or casual. An employer of 6 or fewer agricultural or aquacultural workers may alternatively secure the payment of compensation by obtaining an employer's liability insurance policy (total limit not less than \$1,000,000 and medical payment coverage of not less than \$1,000). Employers of agricultural or aquacultural laborers are not liable for securing compensation payment if the employer has 6 or fewer laborers, or the employer has more than 6 such laborers but the total number of hours they worked in a week does not exceed 240 and has not exceeded 240 hours at any time during the 52 weeks immediately preceding the injury.	Compulsory
MD	Agricultural employees whose employer has 3 or more full-time employees or a yearly payroll for full-time employees of \$15,000. Office workers are exempt from coverage. Independent contractors on farms, other than migrant workers, do not have coverage. Owner-operators of large tractor-trailer vehicles are excluded from coverage.	Compulsory
MA	Agricultural workers are covered the same as all other employees.	Compulsory
NH	Agricultural workers are covered the same as all other employees.	Compulsory
NJ	Agricultural workers are covered the same as all other employees.	Elective
NY	Requires workers' compensation coverage of farm laborers for 12 months, from April 1, if the farmer's total cash wage remuneration paid to all farm laborers during the preceding calendar year amounts to \$1,200 or more; farmworkers supplied to a farm by a farm labor contractor would be deemed to be employees of the farmer.	Compulsory
PA	All agricultural workers if the employer pays one agricultural worker wages of \$1,200 or more or furnishes employment to one employee in agricultural labor for 30 or more days.	Compulsory
VT	All agricultural workers except those working for an employer whose aggregate payroll is less than \$2,000 in a calendar year.	Compulsory
WV	Employees of an employer who has 6 or more full-time workers in agricultural service.	Compulsory

An excerpt from "The On-Farm Mentor's Guide: Practical Approaches to Teaching on the Farm" published by the New England Small Farm Institute

Premiums. The first thing that most new employers want to know about Workers' Compensation Insurance is how much they will have to pay to insure their workers. The answer varies depending on what the employees do, the location of the job, and the accident records of the occupation in general as well as that of the specific employer.

Private insurance companies provide Workers' Compensation Insurance and must structure the premium costs so that they make a profit on the business. In most states, these companies are free to charge whatever they wish; competition between them serves to keep premiums as low as is practical. The only way to determine what your premiums will be is to call several insurance companies to inquire.

Five states in the Northeast region do set premium rates. The rates for these states in 2004 are listed in the chart titled, "Sample Workers' Compensation Insurance Premiums (2004)," on the following page. As you can see from this chart, there are a number of listed categories, or classifications. These classifications each have a code that is used by the insurance industry as a matter of convenience. And because occupations such as farming include so many types of jobs, farm employees tend to fall under classifications such as "Nursery," "Market Garden," "Dairy," or "Field Crops."

The dollar amounts listed in the "Sample Premiums for Workers' Compensation Insurance" chart refer to dollars per \$100.00 of payroll. For example, if a dairy farmer in New Jersey were paying \$4,000 in payroll, she would have to pay forty times the premium rate of \$6.84, or \$273.60, to insure a worker classified as "Dairy." If she had an employee who operated farm machinery but did not work in the dairy, he would fall under the farm machinery operation classification and she would pay a different rate to insure him.

In cases where there is no listing for a particular classification in a state, your insurance agent can inform you about the premium. You can keep up with premium rate changes and other recent developments on the topic of Workers' Compensation Insurance on web sites such as www.iii.org/media/hottopics/insurance/workerscomp/?printerfriendly=yes.

Sample Workers' Compensation Insurance Premiums (2004)

State	Job Title	Rate/ \$100 Payroll	State	Job Title	Rate/ \$100 Payroll
MA	Nursery	\$4.09	PA	Nursery	
	Market Garden	2.29		Market Garden	\$6.68
	Orchard	4.33		Orchard	5.49
	Poultry or Egg	4.89		Poultry or Egg	8.52
	Dairy	4.89		Dairy	8.01
	Field Crops	2.29		Field Crops	6.68
	Farm Machinery Op.	5.46		Farm Machinery Op.	
	Berry or Vineyard	5.54		Berry or Vineyard	5.49
	Cattle or Livestock	4.92		Cattle or Livestock	9.32
	Animal Raising	4.89		Animal Raising	9.32
NH	Nursery	\$5.84	RI	Nursery	\$8.66
	Market Garden	6.65		Market Garden	5.33
	Orchard	7.81		Orchard	
	Poultry or Egg	5.64		Poultry or Egg	8.72
	Dairy	12.95		Dairy	10.48
	Field Crops	12.56		Field Crops	
	Farm Machinery Op.	12.89		Farm Machinery Op.	
	Berry or Vineyard	6.84		Berry or Vineyard	
	Cattle or Livestock	12.11		Cattle or Livestock	11.86
	Animal Raising	8.64		Animal Raising	
NJ	Nursery	\$4.67			
	Market Garden	2.50			
	Orchard	4.98			
	Poultry or Egg	10.97			
	Dairy	6.84			
	Field Crops	6.87			
	Farm Machinery	6.87			
	Berry or Vineyard	2.50			
	Cattle or Livestock	6.87			
	Animal Raising	6.87			

The Fair Labor Standards Act (FLSA) and Agricultural Workers

FLSA, administered by the Department of Labor (DOL), is a broad federal statute that sets minimum wage, overtime, recordkeeping, and child labor standards. "Virtually all employees engaged in agriculture are covered by FLSA."³ This is one of the most important federal laws for on-farm mentors to understand because it covers some of their most basic concerns. It also exempts agricultural employers from certain provisions in each of the above areas—minimum wage, overtime, recordkeeping, and child labor.

³www.dol.gov/regs/compliance/whd

According to the Migrant and Seasonal Agricultural Worker Protection Act (MSAWPA), to qualify an employee as exempt from the minimum wage, overtime pay, recordkeeping, or child labor requirements, you must first show that the employee in question is “employed in agriculture,” as defined at the federal level by FLSA—state definitions may vary. Just as trainees can be employees or not, depending on what they are doing, employees can be agricultural or not, also depending on the task. For example, milking a cow is considered agricultural labor, but making cheese from that milk is not. The FLSA definition for agriculture reads: “...farming and all its branches...[including] the cultivation and tillage of the soil, dairying, the production, cultivation, growing, and harvesting of any agricultural or horticultural commodities, the raising of livestock, bees, fur-bearing animals, or poultry, and any practices (including forestry or lumbering operations) performed by a farmer or on a farm as an incident to or in conjunction with such farming operations, including preparation for market, delivery to storage or to market or to carriers for transportation to market.”

Activities covered by the first part of this definition—up to the phrase “and any practices,” are considered as “primary agriculture.” Those in the second part of the definition, from the phrase “any practices” forward, are considered to be “secondary agriculture.” Both types of agricultural work count towards the MSAWPA exemption.

Not surprisingly, an employee engaged in primary agriculture is considered an agricultural worker, or “employed in agriculture.” However, if some of the worker’s tasks do not fall into this category, you must determine whether or not they can be considered as secondary agricultural tasks, performed “incident to or in conjunction with” primary agricultural tasks. For example, during the hours a worker preps and packs produce for a farmer’s market, he or she is doing secondary agricultural labor, but the time spent selling the goods can not be counted as agricultural work.

Keeping track of agricultural vs. non-agricultural hours for each of your employees is important because it determines both the rate and the hours for which you pay them. If someone does even an hour of non-agricultural work in a given week, he or she is not considered an agricultural worker for that entire week. That means that you must pay this employee at the federal minimum wage—not the state agricultural minimum wage—for the entire week,

even if you live in an area where the state agricultural minimum wage supersedes the federal minimum wage.

The definition of the type of work an employee performs in a given week also affects overtime pay. Farmers do not have to pay overtime for agricultural work performed beyond the basic 40-hour workweek. However, they do have to pay overtime for non-agricultural work. If your employees perform non-agricultural work for any time in a given week, you must pay them overtime for any hours they work above forty in that week. “Are your Employees Performing Agricultural Work?” (Worksheet #12, included in Section IV) gives a more complete overview of this issue and includes a check list that will help you determine whether and when your workers are agricultural.

Strategic Thinking

When one farmer learned about these laws, his immediate response was to reassign tasks. “Right,” he said, “I guess I better go back to doing Farmer’s Market. I’ll take my kids and leave the apprentices here to do “agricultural” work while I’m gone. Otherwise, I’ll end up having to pay federal minimum wage along with overtime.”

FLSA AND THE 500 MAN-DAY EXEMPTION

The 500 Man-Day Exemption provided under FLSA applies to many small farmers in the Northeast. This is good news. It exempts smaller farms from many burdensome wage and reporting requirements and provides some relief in the areas of farm worker transportation and housing, as discussed on page 146 and in Chapter 2.3, respectively. It also exempts qualifying farms from most provisions of the Migrant and Seasonal Agricultural Workers Protection Act (MSAWPA) discussed below. To qualify for this important exemption, you must be able to prove that you have not hired agricultural help on any of the farm enterprises that you own or control, no matter what their corporate identity, for more than 500 man-days during any calendar quarter during the preceding calendar year.

For the purposes of this Act, a man-day is defined as “any day during which an employee performs *agricultural* labor for not less

than 1 hour.” You do not need to count work performed by immediate family members, for wages or not, but you must count work performed by other people on all the farm enterprises that you own or manage. For the purposes of easy calculation, five hundred man-days is approximately the equivalent of seven employees employed full-time in a calendar quarter. Qualifying for this exemption requires careful documentation and management of your labor resources. For example, a farmer who hires temporary or part-time employees during part of the year, such as the harvesting season, may exceed the man-day test even though he or she has only two or three full-time employees. Similarly, if a farmer hires an independent contractor to manage the harvest but still has “the power to direct, control, or supervise the work, or to determine the pay rates or method of payment for the harvest hands,” he or she must count the contractor’s employees in calculating man-days. “The 500 Man-Day Exemption” (Worksheet #13, included in Section IV) shows a sample compilation and includes a template you can use to track employee hours.

Splitting Hairs

Let’s suppose, for example, that you have about an hour and a half of watering to be done on a particular day, but no other work. If one employee waters, that day will be counted as a man-day. However, if you split the job between two people, each of whom works for only 45 minutes, the day will not be counted as a man-day.

FLSA, MINIMUM WAGE, AND OVERTIME

As noted above, FLSA exempts some employees from both its overtime and minimum wage provisions and certain other employees only from provisions for overtime pay. Farm workers employed on small farms that qualify for the FLSA 500 Man-Day Exemption are exempt from both provisions. Farm workers on larger operations are exempt from overtime requirements alone. “Minimum Wage and Overtime Exemptions” (Worksheet #14, included in Section IV) will help you determine if you are exempt from paying federal minimum wage and/or overtime.

An excerpt from “The On-Farm Mentor’s Guide: Practical Approaches to Teaching on the Farm” published by the New England Small Farm Institute

Even if you are exempt from paying federal minimum wage, you do have to pay your state's minimum or agricultural minimum wage. The following chart presents state non-agricultural minimum wage rates as of June 2006, as posted at www.dol.gov/esa/programs. Check with your own state Department of Labor to learn if your state has an agricultural minimum and if it applies to you. Massachusetts' current minimum agricultural wage, for example, is \$1.60 an hour, in contrast to its minimum wage of \$6.75 an hour.

State Minimum Wage Rates, June 2006			
Connecticut	\$7.40	New Jersey*	\$6.15
Delaware	\$6.15	New York**	\$6.75
Maine	\$6.50	Pennsylvania	\$5.15
Maryland	\$6.15	Rhode Island	\$7.10
Massachusetts	\$6.75	Vermont	\$7.25
New Hampshire	\$5.15	West Virginia	\$5.15

* \$7.15 after 10/06 ** \$7.15 after 1/07

Other minimum wage exemptions. Immediate family members are also exempt from minimum wage requirements. If a spouse, child, stepchild, foster child, parent, stepparent, or foster parent works on your farm, you are not legally bound to pay at the minimum wage rate. However, other relatives do not fall under the “immediate family” classification, so if you must pay minimum wage to workers, you must also pay those relatives at this rate.

Hand-harvest laborers whom you pay on a piece-rate basis are also exempt. However, you can't simply declare your trainees as hand-harvest laborers. To qualify, they must commute to your farm each day from their permanent residences and have been employed in agriculture fewer than thirteen weeks in the preceding calendar year. Additionally, they must be harvesting, by hand or with hand tools, crops grown in soil.

Workers who are sixteen years old and younger, who work as hand-harvest laborers, and who are paid at the same piece-rate basis as older workers, are also exempt as long as their parents or legal guardians are also employed on your farm.

It's not likely that the fifth exemption to minimum wage requirements applies to any farms in the Northeast, but it's worth men-

tioning for the sake of being comprehensive. Employees who are engaged in producing livestock on the range or who stand by in readiness to care for these animals for at least fifty percent of their time are exempt.

Counting Beans, Beds, and Lessons

If you simply cannot afford to pay your trainees the required minimum wage, consider taking this easy, effective way around the problem. You can pay them what you are supposed to pay, but also charge a certain amount for teaching and/or room and board. This exchange makes it possible to comply with the law and still afford to host trainees. Rates for room and board must be representative of local prices and are regulated by MSAWPA, but rates for training and education are flexible.

As an example, imagine that a farmer in New Jersey is paying a farmworker \$206.00 a week, or \$5.15 an hour, as required by the state minimum wage law, and charging this same person \$50.00 a week for a room and \$40.00 a week for meals. If the farmer's goal is to pay the trainee \$50.00 a week, he can charge \$10.00 an hour for teaching time and schedule 6.6 hours of instruction to make up the balance. Alternatively, the farmer can charge \$30.00 an hour for teaching and nothing for room and board. As long as the instruction time is a little over five hours a week, the trainee will still end up with \$50.00 a week, after paying for the training, and the farmer will be acting within the law.

Remember that you must count rent and any money you make from teaching as a part of your own taxable income. And even if you are exempt from MSAWPA regulations, both you and your trainees will benefit if you clearly state how you will handle the question of wages and charges when you interview. Regard this as part of your potential trainees' education; more than likely, they know little or nothing about agricultural labor law.

FLSA RECORDKEEPING REQUIREMENTS

The FLSA requires you to keep certain records for all employees unless you are exempt from paying them federal minimum wage and overtime. If there is any doubt about their status—for example, if they have ever gone to the farmer's market, tended the farm stand, or helped create a value-added product—it's important to keep these records as a routine part of your administrative work. It could also be successfully argued that keeping these records is a good business practice and well worth doing for that reason alone. Review "FLSA Recordkeeping Requirements" (Worksheet #15, included in Section IV) for a check list of required records, which include:

- Personal information, including employee's name, home

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address, occupation, sex, and birthday if under 19 years of age.

- The hour and day on which employment begins.
- Total hours worked each workday and each workweek.
- Total daily or weekly straight-time earnings.
- Regular hourly pay for any week when overtime is worked.
- Total overtime pay for the workweek.
- Deductions from or additions to wages.
- Total wages paid each pay period.
- Date of payment and pay period covered.

FLSA AND CHILD LABOR

The purpose of FLSA is to ensure that young people's jobs are safe and do not jeopardize their health, well-being, or educational opportunities. FLSA standards apply even if you are not compensating the person in cash. The minimum age for most occupations is 18, but agriculture is an exception. For agricultural work, FLSA has established 16 as the minimum age for employment unless a specific exemption applies."⁴ Although it's perfectly legal to hire anyone who is at least 16 years old to do any sort of work that is defined as agricultural, it is considered "oppressive child labor" to employ a child younger than 16 unless the following exemptions apply.

Your own children are exempt. If you hire 14- or 15-year-old children who are not your own, they may do work that is defined as agricultural under two conditions: the DOL must not categorize the work they are doing as "hazardous," and the work must take place only during non-school hours. The same rules apply to 12- and 13-year-old children with one added proviso: you must also have the written consent of the child's parent or guardian, or their parent or guardian must be employed on your farm. If you hire children under 12 years old, all of the above requirements apply, but in addition, you can only hire them if all of the employees on your farm are exempt from the federal minimum wage requirement. Use "The FLSA Child Labor Exemption" (Worksheet #16, included in Section IV) to make certain your employment practices are not considered oppressive. You can find a table of current state "Child Labor Laws Applicable to Agricultural Employment" at www.dol.gov/esa/programs.

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In addition to the FLSA child labor requirements, you may be subject to state laws that govern child labor. The U.S. Department of Labor is the best resource for this information. Look for the “Table of State Child Labor Laws for Agricultural Employment,” on their website at: <http://www.dol.gov/esa/programs/whd/state/agriemp2.htm>.

A NOTE ABOUT DOL, FLSA, AND CONFIDENTIALITY

Many farmers are reluctant to ask the federal DOL for compliance assistance for fear that a call or e-mail could trigger an investigation. Compliance assistance is “any effort, tool or communication that is designed to help the regulated community comply with the laws and regulations the DOL administers and enforces.” The DOL sponsors an active Compliance Assistance (CA) service. Their Compliance Protocol provides “a uniform policy to alleviate concerns that callers requesting guidance from DOL agency staff may have about becoming the targets of enforcement actions as a result of any information provided during a compliance assistance request.” It reads as follows: “The information provided by an inquiry will be kept confidential within the bounds of the law.... DOL agency staff handling and responding to compliance assistance inquiries are required to maintain the confidentiality of any caller’s identifying information. Compliance assistance inquiries shall not trigger an inspection, audit, investigation, etc....”⁵ In short, DOL does not collect any personally identifiable information unless you offer it, and you may call and/or browse, read, and download from the DOL website without fear of compromising your privacy. Most state departments of labor have similar policies.

THE MIGRANT AND SEASONAL AGRICULTURAL WORKERS PROTECTION ACT (MSAWPA)

The MSAWPA is also administered by DOL, through its wage-hour division. It protects “migrant” and “seasonal” agricultural workers by establishing employment standards related to wages, housing, transportation, disclosure, and recordkeeping. Many on-farm mentors are astonished to discover that the provisions of this Act apply to their own small operations; they never imagined that the terms “migrant” and “seasonal” applied to their “willing workers” and “interns.”

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Workers Defined

As defined by the MSAWPA, "a seasonal agricultural worker is employed in agricultural employment of a seasonal or other temporary nature and is not required to be absent overnight from his [or her] permanent place of residence...." "A migrant agricultural worker is employed in agricultural employment of a seasonal or other temporary nature and is required to be absent overnight from his [or her] permanent place of residence."

Because of this Act, most trainees are classified as either seasonal or migrant workers, and you, as their employer, are subject to its provisions—unless you can document that you qualify for the 500 Man-Day Exemption discussed above. This is another example of why careful recordkeeping can be worth its weight in gold.

However, even though MSAWPA housing regulations do not apply to farmers who qualify for the FLSA 500 Man-Day Exemption, the nearly identical OSHA regulations for farmworker housing, noted in Chapter 2.3, do apply. (Also, see "OSHA Housing Regulations," Worksheet #9, included in Section IV.) In terms of housing standards, the exemption makes little practical difference.

Exemption from MSAWPA provisions does give qualifying farms relief in the area of wages and reporting. But even so, many small farmers make an effort to comply with these regulations because they protect both the employer and the employee. MSAWPA provisions include:

- Paying employees on time and itemizing deductions on pay slips.
- Keeping accurate payroll records for each employee for a period of three years, including the basis on which the wages were paid, the number of piecework units earned, the number of hours worked, the total pay for each pay period, the amounts and reasons for any deductions, and net pay.
- Displaying a MSAWPA poster in a conspicuous place. This poster sets forth the rights and protections that MSAWPA gives to covered workers.
- Giving job applicants a written statement of the terms and conditions of employment in their own language, including "the place of employment, the period of employment, wage rate(s), crops and activities, whether transportation or other benefits are provided, housing and its cost (if provided), ...and

information about any employer charges for goods or services.”⁶

- Giving employees written information about whether or not Workers’ Compensation Insurance is provided and if so, the names of the insurance carrier and the policyholder, the name and telephone number of the people who must be notified of an injury or death, and the time period within which this notice must be given.
- Complying with minimum transportation safety requirements and providing a minimum level of financial security such as through a vehicle liability insurance policy, appropriate Workers’ Compensation Insurance coverage, and/or by posting a liability bond.

If you do not qualify for the 500 Man-Day Exemption, consult Worksheet #17 in Section IV for a check list of the MSAWPA regulations that could apply to you. Pay particular attention to liability issues related to transportation. You can find additional information about the MSAWPA at the USDA Office of Chief Economist, Agricultural Labor Affairs website: <http://www.usda.gov/oce/oce/labor-affairs/MSAWPAsumm.htm>.

THE OCCUPATIONAL SAFETY AND HEALTH ACT (OSHA)

The federal Occupational Safety and Health Act of 1970 created the Occupational Safety and Health Administration within the Department of Labor as well as the National Institute for Occupational Safety and Health (NIOSH) within the Department of Health and Human Resources. The Act is intended to assure safe and healthful working conditions for U.S. workers. As a general rule, every employer must comply with OSHA. However, there are exemptions for agricultural employers that very well might apply to you.

First, OSHA regulations include a “family member exemption.” (See Worksheet #18, “OSHA Agricultural Exemptions,” included in Section IV.) Your immediate family members are not considered employees under OSHA and are excluded from OSHA oversight. OSHA regulations also include a “small farm exemption.” If you employ 10 or fewer employees and do not maintain a “temporary or seasonal labor camp,” your agricultural operation is an “exempt workplace.” It’s important to note that these “exemptions” do not

⁶Federal Register, Vol. 61, No. 53, Monday, March 18, 1966 10911

release you from your legal obligation to provide employees with safe and healthful living and working conditions as specified in OSHA regulations. They mean only that OSHA or DOL officials do not have the right to conduct unannounced compliance visits to your farm. Moreover, because OSHA's "small farm exemption" is voted on annually, it's important to check each year to make sure that it's still in place.

Note that you are not exempt from OSHA regulations if trainees live in separate quarters on your farm—a temporary labor camp. This means that you can be inspected without notice, as discussed in Chapter 2.3. Use the OSHA worksheets (Worksheets #18-21, included in Section IV) to determine whether or not you qualify for OSHA's agricultural exemption and if not, whether you are in compliance with its other requirements.

In addition to the housing standards discussed in Chapter 2.3, OSHA requires that:

- Your field workers have easy access to potable drinking water, toilet facilities, and hand-washing stations, along with training in hygiene.
- You educate your workers about all hazardous chemicals, with the exception of pesticides, to which they may be exposed and keep a written "hazard communication program" on file that describes this training.
- You inform any workers who may be exposed to cadmium, which is contained in some fertilizers and pesticides and which can also be released when welding or soldering metals, about the risks and provide them with protective gear.
- If your farm includes a logging operation, you provide training in hazards, work practices, first aid, and CPR and also provide appropriate equipment for all parts of the operation.
- You post information about OSHA protections and obligations, record all workplace injuries and occupational illnesses, and notify the nearest OSHA office in the event of a workplace fatality or any accident that causes three or more workers to be hospitalized.
- If you are not close to a hospital or clinic, you have a trained first-aid provider and first-aid supplies on site.
- If anhydrous ammonia is used on your farm, it is stored and used in accordance with OSHA regulations.

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You must also comply with numerous regulations regarding the safe operation and maintenance of farm equipment. Roll-over-protective-structures (ROPS) on appropriate tractors are required, as are safety practices for slow-moving vehicles and guards on dangerous equipment such as PTO shafts. Exemptions exist for tractors manufactured prior to 1975 or with 20 hp or less. (See Worksheet #19, included in Section IV.)

Some states have OSHA regulations that supersede the federal Act. In the Northeast region, Vermont and Maryland are the only states that have standards that apply to agricultural workers. Connecticut, New Jersey, and New York have state standards for public sector employees, but farm employees are not included in this category. If you live in Vermont or Maryland, learn what your state standards require; otherwise, assume that the federal standards apply to you.

OSHA, NIOSH, and farm safety. The National Institute for Occupational Safety and Health (NIOSH) is OSHA's partner—the federal agency responsible for conducting research and making recommendations for the prevention of work-related injury and illness. NIOSH staff members are educators, not regulators, and have designated the New York Center for Agricultural Medicine and Health (NYCAMH), in Cooperstown, NY, as one of nine regional agricultural centers responsible for conducting education and outreach on farm safety. NYCAMH is an excellent source of farm safety information, safety-related training, and the personal protective devices required by OSHA. Visit their website at www.nycamh.com.

FEDERAL INSECTICIDE, FUNGICIDE, AND RODENTICIDE ACT (FIFRA)

FIFRA is a federal statute that governs various aspects of pesticide registration and use. The FIFRA provision that is most applicable to agriculture, and particularly to on-farm mentors, is the Worker Protection Standard (WPS).

The WPS is designed to protect workers from pesticide exposure. It applies to two types of employees: general agricultural workers and pesticide handlers who mix, load, or apply agricultural pesticides, clean or repair pesticide application equipment, or assist in any way with applying pesticides. If you use pesticides on your

crops, even those that are botanically derived and/or approved for use in organic production, you must comply with certain parts of the WPS, including training your employees in safe pesticide handling and application and providing them with protective gear. Exemptions from the WPS generally have to do with mosquito control, post-harvest applications and livestock management. In most cases, state departments of agriculture are responsible for enforcing the WPS, although it is a federal Act.

You will find excellent discussions of the WPS in *Summary of Federal Laws and Regulations Affecting Agricultural Employers, 2000*, by Jack Runyan, and *Labor Law Compliance: A Working Guide for Ag/Hort Employers*, published by Gemplers, Inc. These publications are listed in Printed and Electronic Resources, page 246.

FEDERAL LAWS THAT ASSURE “FAIR EMPLOYMENT”

A number of federal laws assure equal employment opportunities to qualified workers. As a standard workplace poster declares, “Equal Employment Opportunity is the Law!” Although these laws provide exemptions for small businesses, most farmers are in favor of them and comply by preference.

- The Equal Pay Act of 1963, as amended, prohibits sex discrimination in payment of wages to women and men performing essentially the same work in the same establishment. However, there are five exemptions for agricultural employers—the same ones that apply to FLSA minimum wage requirements, as discussed above.
- Title VII of the Civil Rights Act of 1964, as amended, prohibits discrimination in hiring, promotion, discharge, pay, fringe benefits, job training, and other aspects of employment on the basis of race, color, religion, sex, or national origin. However, if you employ fourteen or fewer people for less than each working day in twenty or more calendar weeks in the current or preceding calendar year, you are exempt.
- The Age Discrimination in Employment Act of 1967, as amended, protects employees 40 years of age and older from discrimination on the basis of age in hiring, promotion, discharge, compensation, terms, conditions, or privileges of

employment. If you have employed fewer than twenty workers for each working day in twenty or more calendar weeks in the current or preceding calendar year, you are exempt.

- The Americans with Disabilities Act of 1990, as amended, makes it unlawful for an employer to discriminate against any qualified person with disabilities in hiring, promotion, discharge, pay, job training, fringe benefits, and other aspects of employment. If you have employed fewer than fifteen workers for each working day in 20 or more calendar weeks in the current or preceding calendar year, you are exempt.

In most states, “fair employment” laws have similar requirements to the federal acts that cover equal employment opportunities. Check with your state Department of Labor to learn what they entail.

ADDITIONAL LEGAL REQUIREMENTS

A few other laws affect you in your role as an employer. Complying with them is straightforward and takes very little time. Ignoring them could be costly, so it’s wise to learn how to comply with them and make doing so routine.

- **The Immigration Reform and Control Act of 1986 (IRCA)** is easy to comply with for most small farmers in the Northeast. It simply asks you to verify that your employees are legally allowed to work in the U.S. (see Personnel Records, page 133) and prohibits employers from discriminating against immigrants. For the purposes of the law, an employee is any individual who is compensated for services to an employer. The compensation can be monetary or in the form of goods and services such as lodging or food.

Farmers are likely to be familiar with Section H-2A of this Act. It authorizes and regulates the lawful admission of temporary, nonimmigrant workers, H-2A workers, to perform agricultural labor or services of a temporary or seasonal nature when U.S. workers cannot be recruited to fill the jobs.

- **The Family and Medical Leave Act of 1993 (FMLA)** affects very few small farmers in the Northeast, but it does apply to larger farms. It allows employees who work for an employer who had 50 or more employees in 20 or more workweeks of the current or preceding year to take up to twelve weeks of unpaid

leave during any twelve-month period for certain family-related or medical reasons such as caring for a member of the family or after the adoption of a child.

- **The Personal Responsibility and Work Opportunity Reconciliation Act of 1996**, better known as the “Welfare Reform Law,” was designed to promote personal responsibility. The Act includes many provisions, but only one affects you: the New Hire Reporting Program. This program requires states to gather and process information about newly hired people so that if they owe child support, their payments can be enforced. (See Personnel Records, page 133.)

EMPLOYMENT TAX LAWS

Agricultural employers must comply with two major employment tax laws: the Federal Insurance Contributions Act (FICA), or as it's usually known, Social Security, and the Federal Unemployment Tax Act (FUTA). The requirements for each of these laws are extensive. However, they do contain a variety of exemptions that can benefit smaller farms.

In brief, the very smallest farmers gain an exemption from paying the employer's share of FICA. Employers who paid less than \$150 in cash wages to any employee in a year or a total of less than \$2,500 to all employees in a year are exempt. Additionally, farm employers do not have to withhold federal income tax from an employee who is exempt from FICA, for reasons cited above, and is also doing work that the IRS defines as “agricultural labor.”

If you pay \$150 or more in cash wages to an employee or \$2500 or more in cash wages to all your employees, you probably have to pay FICA. However, there are some exceptions to these requirements that can apply to agricultural employers. Review the resources mentioned below to learn about FICA exemptions in detail.

FUTA is designed to provide unemployed workers with partial income during a short period of involuntary unemployment and is mostly funded through employer taxes. It provides small agricultural employers with important exemptions. First, non-cash compensation paid to agricultural laborers is exempt from the FUTA definition of wages—the definition of wages that is used to establish how much federal unemployment tax an employer owes.

Secondly, farmers who pay laborers in cash must pay the FUTA tax only if they paid \$20,000 or more total wages for agricultural labor in any quarter of the current or previous year or employed ten or more workers for some portion of a day in each of 20 different weeks during the current or preceding calendar year.

Clearly, a detailed description of these federal tax laws and their exemptions is beyond the scope of this manual. IRS Publication #51, *The Agricultural Employer's Tax Guide*,⁷ and the previously referenced book by Jack Runyan, *Summary of Federal Laws and Regulations Affecting Agricultural Employers*, are both useful resources. As well, your state may have employment taxes with which you must comply. To be on the safe side, it's wise to consult with a local tax preparer who is familiar with agricultural businesses.

IN SUMMARY...

Regulations Affecting Agricultural Employers										
	FLSA	OSHA	FIFRA/ WPS	MSAWPA	IRCA	Work. Comp.	FMLA	Welfare	Fair Empl.	Tax Laws
Wages	Yes			Yes						Yes
Reporting	Yes			Yes	Yes			Yes		Yes
Housing		Yes		Yes						
Safety		Yes	Yes	Yes						
Transportation				Yes						
Discrimination					Yes				Yes	
Insurance						Yes				
... and Possible Exemptions										
Small farms are potentially eligible for at least partial exemption from:										
FLSA	All (minimum wage, overtime, child labor, reporting).									
OSHA	All (unless trainees are housed on the farm; then housing applies).									
FIFRA/WPS	Only applies to crops, not livestock.									
MSAWPA	All (unless trainees are housed on the farm; then housing applies).									
IRCA	No exemptions.									
Work. Comp.	Varies by state.									
FMLA	All.									
Welfare	No exemptions.									
Fair Empl.	Equal pay and discrimination.									
Tax Laws	Some reporting and withholding requirements.									

⁷<http://www.irs.gov/pub/irs-pdf/p51.pdf>

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LIABILITY INSURANCE

Just as it's important to carry liability insurance on your vehicles, you should plan to carry it on your farm and farm products—particularly if you may delegate production and management responsibilities to trainees. This insurance limits the amount you can be sued in the event of an accident on your farm, whether to an employee or a casual visitor, or for damage that was caused by your farming operations, personal acts, or livestock. A basic policy generally insures your residence, the farm buildings, farm machinery, and a certain amount of land, as well as your family. You can add clauses that cover employee injury and medical expenses or provide an indemnity in the case of accidental death.

The amount of coverage you need varies with the operation. If in any doubt, talk to neighboring farmers or those selling the same products in your state to learn about their coverage. Many farmers in the Northeast insure themselves to a single occurrence limit of a million dollars; others carry greater amounts, depending on the needs of their operation. Farmers who sell at a farmers' market, for example, are usually required to insure up to a certain amount in order to be a vendor at the market. But even if you sell only wholesale, say to restaurants or retail outlets, it's wise to carry product liability insurance if you market animal products or produce that will be eaten raw. Someone may try to sue in the belief that your product carried a pathogenic organism.

Although your Workers' Compensation Insurance policy covers injuries to your trainees while they are actively working for you, it may not cover them during non-working hours. Check with your insurance agent to determine whether you need to craft your general liability policy to cover them when they aren't actively performing agreed-upon work on your farm.

Farmers who own horses and allow visitors to ride them or teach equestrian classes and growers who offer pick-your-own opportunities will probably want to look into special policies that cover injury as a consequence of these activities.

WEARING TWO HATS

As a host to trainees, you assume two separate but closely related clusters of legal responsibilities—one associated with being an employer, which was discussed at length above, and a second as-

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sociated with being a landowner. Even if you lease land, it's wise to review the following issues with your landlord.

People who come onto your land are present there as trespassers, licensees, or invitees. If they are injured or in an accident, their status at the time they are hurt determines whether or not your liability insurance will cover them. The following discussion is general in nature and reflects the law in most states, even if the particulars and terminology are somewhat different. But these classifications are creatures of state law, so it's important to determine whether your state modifies them in any way. You can research this by going to the website of the National Agricultural Law Center: <http://www.nationalaglawcenter.org/readingrooms/landownerliability/>.

Trespassers. Trespassers are uninvited visitors and are generally on your property without your knowledge—most likely for recreational purposes such as hiking, hunting, or simply watching birds. As a landowner, you owe the least duty of care to these people—to the point of none in some cases. However, there are exceptions. If you have knowledge of frequent trespassers, your duty of care may increase slightly. As well, you must warn trespassers by posting signs about any dangers that could cause serious injury or death, especially those they are unlikely to discover themselves.

Most states have passed “recreational use” statutes that will protect you against the threat of lawsuits from recreational users. If they injure themselves while enjoying your hospitality without your invitation, you cannot be held financially responsible for their injuries—with two exceptions. You may not be protected in cases judged as “malicious conduct,” for example, having a dangerous footbridge or when minor children hurt themselves on an “attractive nuisance” such as an unattended tractor parked on a hill.

You owe trespassing children a greater duty of care because they lack mature judgment and are not usually able to appreciate risks. The attractive nuisance doctrine requires that you take reasonable measures to protect them from injury if you have created or maintain an artificial condition in an area where it could lure them into danger. Natural features such as ponds do not usually raise the standard of care. But improvements such as swings or docks may be judged to be attractive nuisances.

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Impress on your trainees that they have a responsibility to make sure that their activities on your farm never result in a situation that could be considered a dangerous condition or an attractive nuisance. For example, putting equipment away after a job is finished should be routine.

Licensees. Licensees are people who are on your property with your permission but not to provide a benefit to you. For example, if you grant permission to your neighbors to walk on your property, they are licensees. You owe a higher duty of care to them than you do to trespassers but a lesser duty than you owe to invitees. You must notify licensees about hidden dangers on your property and you may not act in any way that could cause them harm. In some states, you must repair dangerous conditions for the benefit of licensees. Sometimes, there is a very thin line between the classification of licensee and invitee, so it's best to treat them as you do invitees.

Invitees. Invitees are people who come onto your property at your request and for your benefit. As such, they merit the highest duty of care. This category of visitor can include people who pay for the privilege of visiting farm animals, customers for your farmstand or CSA, short-term contractors, agricultural salespeople, repair people, your trainees, and your personal guests.

You have a duty to provide invitees with an environment that contains no dangerous conditions or attractive nuisances and give contractors and other workers a safe work environment. Take care to warn all invitees of hazards or potential dangers such as electric fences and post signs where appropriate.

To be on the safe side, you may restrict invitees to certain areas of your farm. Consider posting signs to limit the areas where their presence is welcome. Let them know that if they venture off the hiking trail and into a posted area, for example, they become trespassers. Again, make sure your trainees are your partners in maintaining a safe environment. For example, lettuce knives left scattered around the farmstand area could quickly become a dangerous condition or an attractive nuisance.

Last but not least, be cautious about charging people a fee for the privilege of using your property. If you do so, you are likely to

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lose any protection that a recreational use statute might provide. Again, check your own state laws, because these statutes vary widely from state to state.

TYING IT ALL TOGETHER

The legal and administrative requirements of on-farm mentoring can seem overwhelming when clustered together as they are in this section of the guide. But once you put your mind to it, being in compliance really isn't that hard to achieve and the rewards are immense—especially in terms of sheer peace of mind. Many of the regulations are sensible and promote health and safety. If you remember that you would want your family protected by the same sorts of standards required by these laws and regulations, complying with them no longer seems so inconvenient or burdensome.

If you are put off by lengthy discussions of regulatory issues, consider creating a personal collection of good reference material. For example, the previously referenced handbook by Jack Runyan is worth having in your private library. You may also want to visit a website that gives a good overview of these requirements, such as: <http://www.ers.usda.gov/Briefing/FarmLabor/laborlawreg/>.

Finally, take the time to complete the worksheets on legal matters included in Section IV of this guide. By doing so, you're likely to discover that you are exempt from many regulations and also that you can develop templates and systems to simplify compliance with others. They are designed to help you navigate what could otherwise be a bewildering maze of legal requirements associated with the business end of your on-farm mentoring role.

WORKSHEET #12

ARE YOUR EMPLOYEES PERFORMING "AGRICULTURAL" WORK?

Agricultural work. As defined by The Fair Labor Standards Act (FLSA), "agricultural work" involves "farming and all its branches... [including] the cultivation and tillage of the soil, dairying, the production, cultivation, growing, and harvesting of any agricultural or horticultural commodities...., the raising of livestock, bees, fur-bearing animals or poultry, and any practices (including forestry or lumbering operations) performed by a farmer or on a farm as an incident to or in conjunction with such farming operations, including preparation for market, delivery to storage or to market or to carriers of transportation to market." (*Section 3 (f) of the FLSA*)

Under certain provisions of FLSA, agricultural employers are exempt from paying federal minimum wage and overtime for documented "agricultural work" performed by their employees. Eligibility for these important exemptions requires week-by-week documentation that each employee has been engaged solely in "agricultural work."

Non-agricultural work. Not all activities performed on a farm are considered agricultural. Under certain circumstances, one or more of your employees may not qualify as agricultural labor in any given week, depending on the nature of the work you ask them to perform. Use the check list below to determine whether any of your employees are performing work that is "non-agricultural."

During any given weekly pay period:

Have any of my employees spent any of their work time engaged in marketing (e.g. selling at farmers' market or staffing a farmstand)?	Y	N
Have any of my employees worked in a packing shed that handles produce for more than my farm?	Y	N
Have any of my employees worked in a processing plant that handles produce for more than my farm?	Y	N
Have any of my employees engaged in other non-agricultural activities while performing paid work for me?	Y	N

If you answered "Yes" to any of these questions, the employee engaged in non-agricultural work must receive federal minimum wage and overtime pay for the entire week during which the non-agricultural work was performed.

If you answered "No" to all of these questions, your employees have been engaged solely in agricultural work and you are exempt from paying them minimum wage and overtime for work performed during that week.

WORKSHEET #13

THE FLSA 500 MAN-DAY EXEMPTION

The Fair Labor Standards Act (FLSA) 500 Man-Day Exemption applies to agricultural work. It frees small-scale agricultural employers from several requirements, including:

- Paying federal minimum wage and overtime for agricultural work, although you must pay the state agricultural minimum wage (if any).
- Complying with the wage and reporting requirements of the Migrant and Seasonal Agricultural Worker Protection Act (MSAWPA).
- Complying with MSAWPA housing regulations, although you must comply with OSHA housing regulations if trainees or other employees live on your farm.

To qualify for the 500 Man-Day Exemption, an agricultural employer must be able to prove that he or she has not hired help for more than 500 man-days of *agricultural labor* during any calendar quarter during the *preceding calendar year*. For the purposes of this exemption, a man-day is defined as "any day during which an employee performs *agricultural* labor for not less than 1 hour."

The burden of proof of eligibility falls on the employer. To track this information, you will need to keep careful records of the hours per day that each employee performs *agricultural* work. You can simplify this task by asking each employee to sign in and sign out each day and compile the information at the end of every week, month, and then quarter. As with so many other recordkeeping functions, it's imperative to make it a routine. Otherwise, you are likely to fall behind on it. If you decide to claim this exemption, you'll need the documentation to support your claim.

Below is a sample chart to showing the compilation of the number of days in each quarter DURING THE PREVIOUS YEAR that each employee performed *agricultural* work for at least one hour, as well as a final calculation for the year.

Hours of Agricultural Labor Worked Per Day

Employee:	Quarter 1 (1/1 – 3/31)	Quarter 2 (4/1 – 6/30)	Quarter 3 (7/1 – 9/30)	Quarter 4 (10/1 – 12/31)
Employee #1	25	78	65	0
Employee #2	10	78	65	35
Employee #3	0	14	78	0
Totals:	35	170	208	35

This farmer qualifies for the 500 Man-Day exemption because her employees, as a group, performed *agricultural* work for fewer than 500 man-days during any calendar quarter of the previous year.

WORKSHEET #13 (PAGE 2)**THE FLSA 500 MAN-DAY EXEMPTION (CONT'D)**

To document eligibility for the 500 man-day exemption, you can use a sheet similar to the one below to keep track of the number of hours, *each* day, that *each* of your employees performs agricultural and non-agricultural work on your farm. When calculating man-days, count only those days on which an employee was employed *for an hour or more* of agricultural work.

Your Farm Name

Week Beginning: _____

Hours of Agricultural Labor Worked Per Day

	Employee #1	Employee #2	Employee #3	Employee #4	Employee #5	Employee #6	Employee #7
Day #1							
Day #2							
Day #3							
Day #4							
Day #5							
Day #6							
Day #7							

Hours of Agricultural Labor Worked Per Day

	Employee #1	Employee #2	Employee #3	Employee #4	Employee #5	Employee #6	Employee #7
Day #1							
Day #2							
Day #3							
Day #4							
Day #5							
Day #6							
Day #7							

WORKSHEET #14

FLSA MINIMUM WAGE AND OVERTIME EXEMPTIONS

Minimum Wage. The Fair Labor Standards Act (FLSA) provides agricultural employers with an exemption from paying federal minimum wage for agricultural work. Use the following check list to determine if and when you qualify. Remember that this exemption does not apply to non-agricultural work. Nor does it necessarily exempt you from paying state minimum wages or state agricultural wages. To learn whether your state regulations supersede federal ones, contact your state Department of Labor.

Do you qualify for the 500 Man-Day Exemption? (See Worksheet #13) Y N

If yes, you do not have to pay your employees at the federal minimum wage rate for agricultural work.

If no, answer the following questions for each employee:

Is the employee a member of your immediate family (i.e., a parent, spouse or child; a stepchild, stepparent or foster parent)? Y N

Is the employee a piece-rate worker who travels to the farm from his or her permanent residence every day? Y N

Does the employee get paid on a piece-rate basis as a hand-harvest laborer? Y N

Did the employee perform fewer than 13 weeks of agricultural labor for you in the previous year? Y N

Is the employee 16 years of age or younger? Y N

If yes, did the employee work as a hand-harvest laborer at a piece-rate that is the same as your employees who are older than 16? Y N

If yes, does a parent or legal guardian of the employee work on your farm? Y N

Does the employee spend more than 50% of his or her time on land that is not cultivated, actively caring for, or standing in readiness to care for, cattle, sheep, horses, goats, and other domestic animals ordinarily raised or used on the farm? Y N

If you answered "Yes" to any of these questions, you do not have to pay that employee at the federal minimum wage rate for agricultural work.

Overtime. The overtime exemption for agricultural workers is broader than the exemption for minimum wage—it includes all farms, regardless of size. Nevertheless, it is closely linked to the strict definition of "agricultural work" and does not extend to any work performed by your employees that is deemed to be "non-agricultural."

WORKSHEET #15

FLSA RECORDKEEPING REQUIREMENTS

Agricultural employers who are exempt from federal minimum wage and overtime requirements are also exempt from the Fair Labor Standards Act (FLSA) record-keeping requirements. However, if you ever need, at some point, to ask an employee to stand in for you at the farmers market or engage in some other "non-agricultural" work, it is prudent to keep the following records as a matter of course. Use the following check list to make certain that you are in compliance.

Do you keep the following records?

Personnel records, including the employee's name, home address, occupation, sex, and birthday if under 19 years of age.	Y	N
The hour and day of the week at which the workday begins.	Y	N
Total hours worked each workday and each workweek.	Y	N
Total daily or weekly straight-time earnings.	Y	N
Regular hourly pay for any week when overtime is worked.	Y	N
Total overtime pay for the workweek.	Y	N
Deductions from or additions to wages.	Y	N
Total wages paid each pay period.	Y	N
Date of payment and pay period covered	Y	N

If you answered "Yes" to all of the above, you are in compliance with this provision of the Act.

WORKSHEET #16

THE FLSA CHILD LABOR EXEMPTION

The Fair Labor Standards Act (FLSA) stipulates that any child 16 years of age or older may legally perform any "agricultural" job. Employing children under 16 in agriculture is considered "oppressive child labor," with certain exceptions.

If you can answer "Yes" to every question on the following check list, your young employee's work will not be considered "oppressive child labor," and that child may legally perform non-hazardous agricultural work.

1. Is the worker your own child (i.e., the child of the farm owner or operator)? Y N

2. If the child is not your own, and:
 - If the child is 14 to 15 years old,
 - Is the child performing only "agricultural work"? Y N

 - Is the child engaged only in work that is not defined as hazardous by the Department of Labor? Y N

 - Is the child employed only during non-school hours? Y N

 - If the child is 12 to 13 years old,
 - Is the child performing only "agricultural work"? Y N

 - Do you have the written consent of the child's parent or legal guardian or is the parent or legal guardian also employed on your farm? Y N

 - Is the child engaged only in work that is not defined as hazardous by the Department of Labor? Y N

 - Is the child employed only during non-school hours? Y N

 - If the child is under 12 years old,
 - Is the child performing only "agricultural work"? Y N

 - Are all employees on your farm exempt from federal minimum wage? Y N

 - Do you have the written consent of the child's parent or legal guardian, or is the parent or legal guardian also employed on your farm? Y N

 - Is the child engaged only in work that is not defined as hazardous by the Department of Labor? Y N

 - Is the child employed only during non-school hours? Y N

WORKSHEET #17

MSAWPA REGULATIONS

The Migrant and Seasonal Agricultural Worker Protection Act (MSAWPA) "protects migrant and seasonal agricultural workers by establishing employment standards related to wages, housing, transportation, disclosures and recordkeeping."⁸

If you qualify for the 500 Man-Day Exemption, you are exempt from MSAWPA regulations. (Note, however, that MSAWPA does *not* exempt you from OSHA housing regulations.) If you do not qualify for this exemption, use the check list below to be certain that you are in compliance with MSAWPA regulations.

TOPIC AREA	REQUIREMENTS	YES / NO	
Wages	Pay workers when wages are due.	Y	N
	Give workers itemized, written statements of earnings each pay period, including any amount deducted and reasons for the deduction.	Y	N
Housing	Provide housing that complies with federal, state and local safety and health standards.	Y	N
	Post statement of the terms and conditions of occupancy in a visible location or give this statement to workers.	Y	N
Transportation	Properly insure vehicles used to transport workers.	Y	N
	Allow only licensed drivers to operate such vehicles.	Y	N
	Use only vehicles that meet federal and state safety standards.	Y	N
Disclosure	Inform prospective employees, in writing, about:		
	Work to be performed.	Y	N
	Wages to be paid.	Y	N
	Period of employment.	Y	N
	Workers' Compensation arrangements.	Y	N
	State Unemployment Insurance arrangements.	Y	N
	Display an MSAWPA poster that sets forth the rights and protections of the workers.	Y	N
Recordkeeping	Keep complete and accurate payroll records for all workers.	Y	N

⁸<http://www.dol.gov/esa/regs/compliance/whd/>

WORKSHEET #18

OSHA AGRICULTURAL EXEMPTIONS

The mission of Occupational Safety and Health Administration (OSHA) is to ensure safe and healthful working conditions for all workers. OSHA's many areas of regulatory authority are listed in Worksheet #19, page 193. Three exemptions are available to agricultural employers under OSHA. Use the following check list to determine whether or not you qualify.

First, does OSHA regard you as an agricultural employer? Y N

If yes, you may be eligible for:

The family member exemption.

Are members of your immediate family employed as *agricultural* workers in your farming operation? Y N

Note that "immediate" family members include a parent, spouse, or child, and in some cases, a stepchild, stepparent, or foster parent—not cousins, aunts, and uncles, and not permanent members of your household whom you may be in the habit of regarding as "family."

If yes, the provisions of OSHA do not apply to them, and you do not need to count them as agricultural employees when determining if you are eligible for OSHA's small farm exemption, below.

The small farm exemption.

Is the annually renewed exemption for farms with fewer than ten employees valid in the current year? (Check with the DOL website, <http://www.osha.gov/comp-links.html> to determine this.) Y N

If yes, did you employ fewer than 10 workers, not counting members of your immediate family, on EVERY day during the past 12 months? Y N

If yes, did you operate a temporary labor camp at any time during the past 12 months? To determine this, check with your state Department of Labor to learn how temporary labor camps are defined and regulated in your state. Y N

If you answered "Yes" to the first two questions and "No" to the third, you are exempt from several federal OSHA regulations (see Worksheet #19) under the small farm exemption.

The older equipment exemption.

As you read through Worksheet #19, notice that farm tractors manufactured prior to October 1976, and/or tractors with less than 20 horsepower may be exempt from the requirement that they be fitted with roll-over protection structures (ROPS) prior to use by agricultural employees.

WORKSHEET #19

OSHA HEALTH COMPLIANCE FOR AGRICULTURAL EMPLOYEES

Use the following check list to make certain that you are in compliance with Occupational Safety and Health Administration (OSHA) worker health regulations. If you have any questions about any of these items, check with your OSHA regional office. The phone numbers for the regional offices are: Region 1, which includes CT, MA, ME, NH, RI and VT: 617-565-7164; Region 2, which includes NJ and NY: 212-337-2378; and Region 3, which includes DL, MD, PA, and WV: 215-861-4900. You can also find up-to-date information at: www.osha.gov/.

Note that the last four items on this check list (marked with *) apply only to employers who hire 11 or more workers on at least one day of the year (i.e., who do not qualify for the small farm exemption). For further information about this stipulation, please refer to the following website: www.osha.gov/pls/oshaweb/owadisp.show_document?p_table=FACT_SHEETS.

1. Is there a roll-over protective structure (ROPS) on every tractor that employees use? Y N
(Note that the regulation does not apply to low-profile tractors used in orchards, vineyards, greenhouses, or barns where the vertical clearance is insufficient and their use is incidental to the work performed, tractors used with mounted equipment that is incompatible with ROPS, and tractors manufactured prior to October 1976 and/or with 20 or less hp. For more information, see: <http://www.cdc.gov/nasd/docs/d000801-d000900/d000892/d000892.html>.)
2. Are all tractors with ROPS equipped with a seat belt that meets OSHA requirements? Y N
3. Have you trained employees in safe tractor operation in accordance with 1928 Subpart C Appendix One? Y N
(Note that you can find a description of the requirements of this training program at: <http://www.nclabor.com/osha/etta/1928.pdf>.)
4. Are employee tractor operators protected from contact with hazardous vehicle fluids and sharp edges and corners in the event of an accident? Y N
5. Do you train employees when you first hire them and then annually in the safe operation and maintenance of all farm field equipment and farmstead equipment with moving machinery parts with which they will be working, according to the standards set out in 1928.57 (a) (7,8, & 9)? Y N
(Note that you can find a description of the requirements of this training program at: <http://www.nclabor.com/osha/etta/1928.pdf>.)
6. Are all moving machinery parts of farm field equipment and farmstead equipment properly guarded or shielded or is the operating location guarded in accordance with 1928.57 (a) (7,8, & 9)? Y N
(Note: See above for website.)
7. Is equipment with moving machinery parts serviced safely and in accordance with 1928.57 (a) (11)? Y N

WORKSHEET #19 (PAGE 2)**OSHA HEALTH COMPLIANCE FOR AGRICULTURAL EMPLOYEES (CONT'D)**

- | | | |
|---|---|---|
| 8. Are all power take-off (PTO) shafts properly guarded in accordance with 1928.57 (b) (1) and (c) (1)?
(Note that some equipment that was manufactured before 1975 is exempt from some portions of this provision. Check the previously referenced website for further information.) | Y | N |
| 9. Do all tractors and PTO-driven equipment have a prominently displayed sign stating that PTO shields must be kept in place? | Y | N |
| 10. Are other power transmission components (e.g., revolving shafts, gears, belts, chains) and ground-driven components, if used by employees while in motion, guarded in accordance with 1928.57 (b) (2) and (c) (2)? | Y | N |
| 11. Are functional equipment components (e.g., choppers, cutter bars, auger bars, augers) guarded in accordance with 1928.57 (b) (4) and (c) (4)? | Y | N |
| 12. Are moving parts that continue to rotate after the power is disengaged guarded in accordance with 1928.57 (b) (4) and (c) (4)? | Y | N |
| 13. Are employees protected by electrical disconnection from automatic motor reset while maintaining or servicing equipment in accordance with 1928.57 (d)? | Y | N |
| *14. Are field workers provided with potable drinking water, suitably cool and in sufficient amounts, and dispensed in single-use drinking cups or by fountains, in accordance with 128.110 (c) (1)?
(Note: For further information, check: http://www.osha.gov/pls/oshaweb/owadisp.show_document?p_table=FACT_SHEETS&p_id=137 .) | Y | N |
| *15. Is there access to at least one toilet and one handwashing facility, in accordance with 128.110 (c) (2), for each 20 field workers or fraction thereof, within a quarter mile of their place of work in the field? | Y | N |
| *16. Are potable water, toilet, and handwashing facilities maintained in accordance with appropriate public health sanitation practices and with 128.110 (c) (3)? | Y | N |
| *17. Do you: | | |
| Notify each field worker about the location of the water and sanitation facilities? | Y | N |
| Allow workers reasonable opportunities to use these facilities? | Y | N |
| Inform workers about good hygiene practices to minimize exposure to fieldwork hazards, in accordance with 128.110 (c) (4)? | Y | N |

WORKSHEET #20

OSHA GENERAL INDUSTRY COMPLIANCE

The Occupational Safety and Health Administration (OSHA) stipulates that all agricultural operations abide by the following, termed the "general industry" provisions. Use the following check list to make certain that you are in compliance.

- | | | |
|---|---|---|
| 1. Is the OSHA's Job Safety & Health Protection poster, "You Have a Right to a Safe and Healthful Workplace," displayed in a prominent location? | Y | N |
| 2. Do you record all job-related injuries and illnesses on OSHA Form 300, "Summary of Work-Related Injuries and Illnesses?" | Y | N |
| 3. Do you inform the closest OSHA office within 48 hours in the event of an accident that is fatal to one or more employees or results in the hospitalization of three or more employees? | Y | N |
| 4. Do you post an annual summary of injuries and illnesses in the workplace? | Y | N |
| 5. Do you post any citations near the location of the violation where affected employees will readily see them? | Y | N |
| 6. Are medical personnel readily available for advice on matters of workplace health? | Y | N |
| 7. If an infirmary, clinic, or hospital is not near the workplace, are physician-approved first-aid supplies and a person trained to use them readily available? | Y | N |
| 8. Is a suitable emergency facility provided within the work area for the quick drenching of eyes and body of any employees who may be exposed to injuries or corrosive materials on the job? | Y | N |
| 9. Are all aspects of the design, construction, location, installation, and operation of anhydrous ammonia systems in accordance with 1910.111 (a & b)? | Y | N |
| 10. Are all vehicles that move at less than 25 mph on public roads equipped with the slow-moving vehicle emblem as specified in 1910.145 (d) (10)? | Y | N |
| 11. Are employees given training on hazards and work practices, first aid, and CPR, in accordance with 1910.266? | Y | N |
| 12. Are appropriate personal protective equipment, tools, and machinery provided, maintained, and used in a safe manner as specified in 1910.266? | Y | N |
| 13. Is air monitored in areas where employees are exposed to cadmium? This metal is present in some pesticides and fertilizers and is released when some metals are welded and soldered. | Y | N |
| 14. If exposure to cadmium is above minimum levels, are employees notified and provided with necessary protective equipment? | Y | N |
| 15. Is there a list of hazardous substances used in your workplace? | Y | N |

WORKSHEET #20 (PAGE 2)

OSHA GENERAL INDUSTRY COMPLIANCE (CONT'D)

- | | | |
|---|---|---|
| 16. Is there a written hazard communication program dealing with Material Safety Data Sheets (MSDS), labeling, and employee training? | Y | N |
| 17. Is each container for a hazardous substance, such as vats, bottles, or storage tanks, labeled with product identity and a hazard warning (communication of the specific health hazards and physical hazards?) | Y | N |
| 18. Is there a Material Safety Data Sheet readily available for each hazardous substance used? | Y | N |
| 19. Is there an employee training program for hazardous substances? | Y | N |
| 20. Does this program include: | | |
| An explanation of what an MSDS is and how to use and obtain one? | Y | N |
| MSDS contents for each hazardous substance or class of substances? | Y | N |
| Explanation of "Right to Know"? | Y | N |
| Identification of where an employee can see the employer's written hazard communication program and where hazardous substances are present in their work areas? | Y | N |
| The physical and health hazards of substances used in the work area and the specific protective measures used? | Y | N |
| Details of the hazard communication program, including how to use the labeling system and MSDSs? | Y | N |
| 21. Do you train employees in the following: | | |
| How to recognize tasks that might result in occupational exposure? | Y | N |
| How to use work practice and engineering controls and personal protective equipment and to know their limitations? | Y | N |
| How to obtain information on the type, selection, proper use, location, removal, handling, decontamination, and disposal of personal protective equipment? | Y | N |
| Who to contact and what to do in an emergency? | Y | N |
| 22. If packages or vehicles have been received that are marked by the Department of Transportation as containing hazardous substances, have the DOT labels, markings, and placards been maintained until all hazardous residue or vapors have been purged in accordance with 1910.1201? | Y | N |

WORKSHEET #21

OSHA ADDITIONAL TOPIC COMPLIANCE

Farm owners or managers who operate any sort of non-agricultural enterprise on the farm must comply with various other Occupational Safety and Health Administration (OSHA) regulations. Check the federal website, www.osha.gov/, to learn about regulations that cover the following topic areas.

Use this worksheet by circling the "Y" for any topic that you may believe is relevant to non-agricultural areas on your operation and follow-up by researching the provisions.

TOPIC	RELEVANT?	
Walking/working surfaces.	Y	N
Exit routes, emergency action plans, and fire protection plans.	Y	N
Powered platforms, manlifts, and vehicle-mounted work platforms.	Y	N
Occupational health and environmental control.	Y	N
Hazardous materials.	Y	N
Personal protective equipment.	Y	N
General environmental controls.	Y	N
Medical and first-aid.	Y	N
Fire protection.	Y	N
Compressed gas and compressed-air equipment.	Y	N
Materials handling and storage.	Y	N
Hand and portable powered tools and other hand-held equipment.	Y	N
Welding, cutting, and brazing.	Y	N
Special industries such as bakeries, sawmills, logging operations, and commercial grain handling facilities.	Y	N
Electrical.	Y	N
Toxic and hazardous substances.	Y	N

Section 4: Mentoring Resource Directory

Note: This directory is not an exhaustive list of organizations that support mentoring, but offers a list of larger directories of mentoring programs, organizations that host mentoring opportunities, as well as organizations that are situated within a community and able to help potential mentors connect with apprentices or provide networking.

Agriculture & Land Based Training Association (ALBA)

P.O. Box 6264

Salinas, California 93912

(831) 758-1469

<http://www.albafarmers.org/index.html>

Region: California

Type of Program: Small Farm Incubator, Small Farmer Education Program

Alternative Farming Systems Information Center (AFSIC)

National Agricultural Library

US Department of Agriculture

301-504-6559

<http://afsic.nal.usda.gov>

Region: National

Type of Program: Mentoring Program Directory

American Association of Botanical Gardens and Arboreta (AABGA)

<http://www.publicgardens.org/>

Region: National

Type of Program: Directory of Internship Programs within Gardens and Arboretums

Appropriate Technology Transfer for Rural Areas (ATTRA)

P.O. Box 3657

Fayetteville, AR 72702

(800) 516-779

<http://attra.ncat.org/attra-pub/internships/>

Region: National

Type of Program: Mentoring Program Directory

BioDynamic Farming and Gardening Assoc.

25844 Butler Road

Junction City, Or

97448

(888) 516-7797

<http://www.biodynamics.com/resources>

Region: National (with Limited International Listings)

Type of Program: Mentor Farm Listing

California Certified Organic Farmers (CCOF)

1115 Mission St
Santa Cruz, CA
95060

(888) 423-2263

www.ccof.org

Region: California

Type of Program: Hosts Interns

Carolina Farm Stewardship Assoc.

P.O. Box 448
Pittsboro, NC
27312

(919) 542-2402

<http://www.carolinafarmstewards.org/projects.shtml>

Region: North Carolina, South Carolina

Type of Program: Farm Incubator Program

Center for Rural Affairs*

145 Main St , PO Box 136
Lyons, NE 68038

voice (402) 687-2100

fax (402) 687-2200

http://www.cfra.org/resources/beginning_farmer

Region: Nebraska

Type of Program: Advocacy, Supports Land Transitions

Colorado State University Extension: Beginning Farmer Center*

http://www.ext.colostate.edu/cis/food_ag.html#pro

Region: Colorado

Type of Program: Beginning Farmer Classes, Networking

Cultivating Success*

<http://www.cultivatingsuccess.org/>

Region: Idaho, Washington

Type of Program: Beginning Farmer Courses, On-Farm Apprenticeships on “Cultivating Success” Approved Farms

Farmer Veteran Coalition**

<http://www.farmsnotarms.org/Projects/Swords%20to%20Plowshares.aspx>

Region: National

Type of Program: On-Line Listing of On-Farm Jobs for Veterans

Greenhorns/ National Young Farmers Coalition*

<http://thegreenhorns.net/>

<http://www.youngfarmers.org/category/news/>

Region: National

Type of Program: Young Farmer Organizing, Resources

International Agricultural Exchanges (Agriventure)

#105, 7701 5 Street SE

Calgary, Alberta Canada (403) 255-7799

www.agriventure.com

Region: International

Type of Program: Placement Program for On-Farm Interns

Georgia Organics*

http://www.georgiaorganics.org/about_us/programs_projects.php

Region: Georgia

Type of Program: Mentor and Apprentice Matching Program

Grow Alabama: Organicorps

<http://www.growalabama.com/organicorps.shtml>

Region: Alabama

Type of Program: Farm Incubator, Hosts On-Farm Interns

International Farm Transition Network (IFTN)

Beginning Farmer Center is part of IFTN*

<http://www.farmtransition.org/netwpart.html>

Region: National (By State) and International

Type of Program: Umbrella Website that Links to State-Wide Land Transition Programs across the U.S. which Match Entering Farmers with Retiring Farmers

Holistic Management International*

<http://www.holisticmanagement.org/>

Region: International

Type of Program: Farmer Education

Land Stewardship Project*

821 East 35th Street

Suite 200

Minneapolis, MN 55407

Phone (612) 722-6377

<http://www.landstewardshipproject.org/farmbeg.html>

Region: Minnesota, Illinois, Nebraska, North Dakota, South Dakota, Hudson Valley in New York and Wisconsin

Type of Program: Farm Beginnings Coursework, Mentor and Apprentice Matching, Networking

Maine Organic Farmers & Gardeners Assoc. (MOFGA)*

P.O. Box 170
Unity, ME 04988
(207) 568-4142

www.mofga.org

Region: Maine

Type of Program: Supports Apprenticeships through Hosting Networking Events, Providing Additional Trainings, and Providing Resources for Mentors and Apprentices

Michael Fields Agricultural Institute

W2493 County Road ES
East Troy, WI 53120
(262) 642-3303

www.michaelfieldsaginst.org

Region: Wisconsin

Type of Program: Beginning Farmer Education Workshops and Networking

Midwest Organic and Sustainable Education Service*

P.O. Box 339
Spring Valley, WI 54767
715-772-3153

<http://www.mosesorganic.org/mentoring.html>

Region: Midwest

Type of Program: Farmer to Farmer Mentoring Program

Mississippi Association of Cooperatives

233 E Hamilton St
Jackson, MS 39202-3231
(601) 944-0599

<http://www.mississippiassociation.coop/>

Region: Mississippi

Type of Program: Youth Mentoring Program

Multinational Exchange for Sustainable Agriculture (MESA)

5245 College Ave #508
Oakland, CA 94618

www.mesaprogram.org

Region: National and International

Type of Program: Matches Apprentices with U.S. Host Farms Practicing Organic and/or Sustainable Agriculture

Northeast Organic/Sustainable Agriculture Education Directory

Northeast Organic Farming Association
Massachusetts Chapter
411 Sheldon Road
Barre, MA 01005

978-355-2853

<http://www.nofamass.org/programs/ageddirectory.php>

Region: Northeast US

Type of Program: Describes Educational and Training Programs about Organic or Sustainable Agricultural Methods

NOFA/Massachusetts

411 Sheldon Road

Barre, MA 01005

(978) 355-2853

www.nofamass.org

Region: Massachusetts

Type of Program: Network

NOFA/New Jersey

60 South Main Street

P.O. Box 886

Pennington, NJ 08334

(609) 737-6848

www.nofanj.org

Region: New Jersey

Type of Program: Farm Incubator Project, Network

NOFA/New York

P.O. Box 880

Cobleskill, NY 12043

(607) 652-NOFA

www.nofany.org

Region: New York

Type of Program: Beginning Farmer Resources, Network

NOFA/Rhode Island

51 Edwards Lane

Charlestown, RI 02813

(401) 364-7557

<http://nofari.org/>

Region: Rhode Island

Type of Program: Network

NOFA/Vermont

PO Box 697

Richmond, VT 05477

(802) 434-4122

www.nofavt.org

Region: Vermont

Type of Program: Mentor and Apprentice On-Line Directory

North American Biodynamic Apprenticeship Program

<http://www.bdtraining.org/>

Region: National

Type of Program: Coursework, On-Farm Apprenticeship Matching Program, Network

The New England Small Farm Institute

P.O. Box 608, Belchertown, MA 01007

(413) 323-4531

www.smallfarm.org

Region: Northeast US

Type of Program: Farm Apprentice Placement (Northeast Workers on OrganicFarms/NEWOOF); Aspiring Farmer Resources (Exploring the Small Farm Dream); Beginning Farmer, On-Farm Mentor and Service Provider Resources; New England LandLink

Ohio Ecological Food and Farming Association (OEFFA)

P.O. Box 82234

Columbus, OH 43202

(614) 421-2002

<http://www.oeffa.org/apprentice.php>

Region: Ohio

Type of Program: Online Listing of Mentors and Interested Apprentices

Organic Volunteers

639 Montezuma, no.510

Santa Fe, NM 87501

<http://www.organicvolunteers.org/>

Region: National (with some international listings)

Type of Program: A Directory of Volunteer Opportunities or Educational Exchange Opportunities in Organic and Sustainable Agriculture.

Pennsylvania Association for Sustainable Agriculture (PASA)

P.O. Box 419, 114 West Main Street

Millheim, PA 16854

(814) 349-9856

www.pasafarming.org

Region: Pennsylvania

Type of Program: Farmer Education Program, Network

Practical Farmers of Iowa*

137 Lynn Ave.

Suite 200

Ames, Iowa 50014

Ph: (515) 232-5661

<http://www.practicalfarmers.org/programs/youth-and-next-generation.html>

Region: Iowa

Type of Program: On-Farm Mentor and Apprentice Matching Program, “Farminar” series, Networking Events, and Saving Match Program

Ranch Management Consultants

953 Linden Ave

Fairfield, CA 94533

Phone: 707-429-2292

www.ranchmanagement.com/

Type of Program: Ranching for Profit Classes, Executive Link Mentor Matching Program

Region: Western U.S.

Rodale Institute

http://www.rodaleinstitute.org/ffc_directory

Region: National

Type of Program: Farming for credit on-line directory. Lists and compares hands-on and classroom-based sustainable agriculture education opportunities. It is organized first by region, then alphabetically by state, and then within states by institution. Each entry includes the name of the farm and/or program, URLs, and basic program details on academic offerings such as courses, majors, minors, certificates, etc.

Seattle Tilth Association

4649 Sunnyside Avenue, Room 120

Seattle, WA 98103

(206) 633-0451

www.seattletilth.org

Region: Western Washington

Type of Program: Farmer and Gardener Coursework, Network

South Dakota State University Cooperative Extension*

<http://www.sdstate.edu/sdces/issues/index.cfm>

Region: South Dakota

Type of Program: Program that Matches Current University Students with Area Ranchers

Sustainable Agriculture Education Association

<http://www.sustainableaged.org/>

On-line clearinghouse of post-secondary agriculture education opportunities around the nation.

Region: National

Type of Program: On-Line Directory of Apprenticeships

Sustainable Farming Internships and Apprenticeships

ATTRA - National Sustainable Agriculture Information Service

P.O. Box 3657

Fayetteville, AR 72702

<http://attrainternships.ncat.org/>

Region: National

Type of Program: On-Line Directory of Apprenticeships

University of California: Santa Cruz

Center For Agroecology & Sustainable Food Systems

1156 High Street

Santa Cruz, CA 95064

(831) 459-3240

www.ucsc.edu/casfs

Region: Santa Cruz CA

Type of Program: On-Farm Apprentice Program

VT Women in Agriculture Network (VT WAgN)*

<http://www.uvm.edu/wagn/?Page=education/index.html&SM=education/sub-menu.html>

Region: Vermont

Type of Program: Workshops, Coursework, and Learning Circles for Beginning Women Farmers

Virginia Department of Agriculture: Farmland Preservation*

<http://www.vdacs.virginia.gov/preservation/index.shtml>

Region: Virginia

Type of Program: Land Link Directory, Land Transition Resources

Wisconsin School for Beginning Dairy and Livestock Farmers*

<http://www.cias.wisc.edu/dairysch.html>

Region: Wisconsin

Type of Program: Coursework, Networking

World Wide Opportunities on Organic Farms*

www.woof.org

Region: National and International

Type of Program: Mentor Listing

***Organization that participated in the research project**

****Member Organization of NFFC**

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