Strategic Planning for Producer-led Groups

DATCP Producer-led Group workshop, Feb. 19, 2019

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Strategic Planning

What is it??
Process to identify actions that shape and guide what an organization is, what it does, and why it does it.

What are the benefits of strategic planning??

- Increased effectiveness
- Increased efficiency
- Improved understanding and better learning
Great...but farmers don’t want to plan

FALSE!!!!!!!

We need to understand that not every group is ready for strategic planning
◦ Strategic planning is a lengthy process
◦ Requires time, commitment, and resources
◦ Also a lot of groups are still new

BUT, we can help groups incorporate elements of strategic planning in their efforts
The Interactive ABCs of Strategic Planning

A
Who and what are we, what do we do now, and why?

B
What do we want to be and do in the future, and why?

C
How do we get there?

Source: Bryson and Alston, 2011
Making Your Grant a Reality

(aka- Action Planning) Featuring Dodge Co. HSHW

DATCP 2019 grant described what the group was now and planned out future events.

But, missing the how.
The Process

- **Objective:** Plan out 2019 activities are create obtainable goals and timelines

- **Started out with a conversation about their group now**
  - What is the biggest accomplishment of your group?
  - Challenges?
  - How will your experiences help affect what you do in the upcoming year?

- **Started the ‘how’ process**
  - Identified Goals, How (they would achieve this goal), a Timeline for each event, Who will need to be involved, and Resources needed
  - 4 workshops/field days, research project, incentive program, and 3 outreach events
• 1 flipchart page per activity

• With time constraints, have post-it notes with ‘how’ steps

• Work in groups of 2-3 to fill out the rest of the flip chart
“It’s a little overwhelming to see everything we need to do this year…”

“This was a great brainstorming session—we finally got our ideas down on paper!”
"I’m a visual person, so it is very helpful to see the year mapped out."

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<th>January</th>
<th>February</th>
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<th>December</th>
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</table>
| **Feb. 6-7 workshop** | Continued from Nov & Dec:  
- Develop promotional piece  
- Marketing  
- Equipment  
- Prepare handouts | 12-6 months before:  
- Schedule speaker, set date and location  
- Event: Beginning of Feb.  
- Evaluation | -Schedule speakers  
- Set location and date  
- Confirm Caterer |        |        |     |      |     |        |        |        |           |         |          |          |
| **Pre-Planting Workshop** | - Confirm caterer  
- Develop Budget  
- Equipment  
- Develop promotional materials | -Marketing  
- Prepare handouts | -Event: End March  
- Beginning of April  
- Evaluation |        |        |     |      |     |        |        |        |           |         |          |          |
| **Summer Workshop** | - Set dates, location  
- Discuss topics | -Schedule speakers | -Get equipment  
- Set agenda | -Confirm Caterer  
- Develop Promotional Materials  
- Marketing | -Event: August  
- Evaluation |        |        |     |      |     |        |        |        |           |         |          |          |
| **Fall Field Day** | - Set date and location  
- Schedule speakers  
- Set agenda  
- Put resources together  
- Develop Budget  
- Form Committees | | |        |        |     |      |     |        |        |        |           |         |          |          |
| **-Develop promotional piece** |                     |                                     | -Set agenda: themes, times  
- Develop Budget  
- Form Committees | -Marketing: Promote event  
- Equipment  
- Prepare handouts |        |        |     |      |     |        |        |        |           |         |          |          |

*Confirm caterer  
- Develop Budget  
- Equipment  
- Develop promotional materials*
Next Steps

◦ How has this helped the group?

◦ Meetings!

◦ Helps create agendas with ideas that the farmer group generated

◦ Helps farmer group own the planning process
A-now
Opening conversation

B-future
Opening conversation and planning session

C-how
Planning session
SER Farmer-led Group Network

JANUARY 25, 2019 MEETING
Participating Groups

- Watershed Protection Committee of Racine County
- Cedar Creek Farmers (Washington and Ozaukee Counties)
- Clean Farm Families (Ozaukee County)
- Farmers for Lake Country (Waukesha, Jefferson, Dodge, Washington)
- Dodge County Farmers for Healthy Soil & Water
- Fond du Lac County Farmer-led Group
- Sauk County Farmer-led Group

**Objective:** Provide an opportunity for farmer-led groups to network and share information on achievements and challenges.
Part 1 - Goals and Successes

Each group had to fill out a flipchart sheet and answer the following questions:

1. What are the main goals of your group?
2. What are the key successes of your group?
Clean Family Farms - Ozaukee

**GOALS:**
1. Soil Health
2. Promote Cover Crops, Conservation Tillage, Buffering, & 5R Nutrient Management, Cost Sharing of New Cost Sharing
3. Have Field Plot Available for Public to See/Walk Year Around, To Show Different Crops on Six Plots
4. Have 2-3 Field Days Per Year.

**Successes:**
1. We began planning our first conference.

Racine County

**GOALS:**
- Water Testing (Baseline)
- Soil Health: Water Quality
- More Farmers Accomplish Getting Seeding Dates
- Educate more Farmers + the Public
- Obtain, approach Annual Sponsors
- Further expand area and membership
- Farmers Doing More Test Plots

**Successes:**
- www.wpcracinecounty.org
- Non-profit 501 (c)(3)
- On Agenda for Fox River Summit: Water quality - 10 Farmers did cover crops on 1400 acres
- 5 new grassed buffer participants
- 3 Field days complete, 2 more planned
- Working closely with Dane County group working well with partners LCDC, UWEX, NRCS, FSA

Farmers for Lake Country

**Goals:**
- Improve watershed soil health
- Increase agricultural income
- Strengthen relationships within the community
- Lower total phosphates and at Clearwater River confluence
- Improve fishery lake water quality

**Successes:**
- Pond cleaning

Fond du Lac County

**Goals:**
1. Establish group of farmers focused on improving soil and water quality.
2. Help farmers be more profitable and successful.
3. Provide more education and networking opportunities locally for county farmers.

**Successes:**
1. We began planning our first conference.

Washington County

**Goals:**
- Educate area producers on benefits of No-till Cover Crops (soil health)
- Improve water quality in a way that does not negatively affect water quality
- Continue to provide pasture and other funding incentives
- Connect with local schools/youth about practices
- Improve working relationship with local municipality

**Successes:**
- 2 Field Days - 17 current tasks
Discussion on ‘Successes’

- This was a great opportunity to share ideas—we need to be doing this more

- There was lots of overlap and had similar goals in promoting
  ◦ Soil health
  ◦ Cover crops
  ◦ Water quality
  ◦ No-till

- Plans to present this information to their groups

- Helped groups understand that they are not alone in some of their initiatives

- This also helps newer groups see what other groups have done, so they can connect and form network over similar goals

Collaboration helped answered the ‘how’ for each group
Part 2: Discussion on Challenges

Question to answer: What are some of the challenges that farmer-led groups face?

- Everyone took 5 minutes to brainstorm a list of challenges
- Worked with groups to write top challenges on half-sheets
- Half-sheets were arranged into clusters
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<tr>
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<th>Engaging &amp; Sustaining Farmer’s Participation</th>
<th>Group Function &amp; Capacity</th>
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<td></td>
<td>Moving too quick</td>
<td>Success at first</td>
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<td></td>
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<td>Funding $ (obtaining)</td>
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What are some of the challenges that farmer-led groups face?

• Accelerating adoption
• Building Mentorships and Networks
• Education challenges

• Engaging and Sustaining Farmers Participation
• Group functions and capacity
• Funding

“The hardest thing is getting them to show up!”

“The public is so disconnected from the farm, and we need to reach out to the public, BUT it is very uncomfortable to open your farm to the public”
What came of this?

- **Networking**
  - Realized that they are not alone in successes, goals, and challenges
  - Gave a chance for collaborators to see the challenges the groups are facing

- **Next steps**
  - Future meeting to discuss upcoming year
  - Creating an email list to learn about groups activities

“It would be helpful for us to meet like this again to plan out all our events for the upcoming year”
Why was this successful?

A-*now*
Goals and successes

B-*future*
Goals and successes

C-*how*
Challenges
Integrating Strategic Planning

- Although some farmer-led groups may not be ready to go through every step of strategic planning, it is important to integrate elements of strategic planning:
  - Creates more efficiency and effectiveness of groups
  - Gives them a process that they own

- Great role for collaborators—as it is sometimes hard to know where our boundary is

Need help??

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