

Making It Happen

Profitability and Success

PRE WORKSHOP SURVEY

Dear MIH Participant,

Thank you for participating in the Making It Happen workshop! The goal of the workshop is to help you understand and strategically implement a variety of financial management tools in order to increase the financial strength of their operations. This workshop is part of a research project funded by Northeast SARE to help us understand how to make this type of training as useful as possible. Your participation in this survey and one after this coming growing season is critical. It will help us determine the effectiveness of the workshop.

We will also be sending out periodic tips, tools, reminders, and resources to help reinforce the topics covered today. All participant information collected will be kept strictly confidential, and used only anonymously and solely for the purposes of this project. All educational and training materials developed as a result of this project will be available to participants. We greatly appreciate your time and assistance!

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Contact Information:

Name:

Farm or Food Business:

Email:

Phone:

Address:

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PRE-WORKSHOP SURVEY

1. Which levels of farm business management training have you had in the past?
(Circle all that apply)
 - A. University coursework
 - B. Vocational education training
 - C. Trainings and workshops at conferences, etc.
 - D. Apprenticeships or mentoring program
 - E. Self-taught
 - F. _____ (fill in the blank)

2. At what stage of development do you consider your farm business?
 - A. Start up [0-3 years]
 - B. Establishing [4-10 years]
 - C. Mature [11 or more years]

3. How often do you enter sales and expenses into your accounting software?
 - A. Never. We don't keep financial records.
 - B. Once a year.
 - C. Two or three times a year.
 - D. Four to six times a year.
 - E. Seven to twelve times a year.
 - F. Two to three times a MONTH.
 - G. Once or twice a WEEK.
 - H. More than twice a WEEK.
 - I. Not applicable.

4. How often are you reviewing and making adjustments your financial projections, targets and cash needs?
 - A. Never. I don't use planning data to make decisions.
 - B. Once a year.
 - C. Two or three times a year.
 - D. Four to six times a year.
 - E. Seven to twelve times a year.
 - F. Two to three times a MONTH.
 - G. Once or twice a WEEK.
 - H. More than twice a WEEK.
 - I. Not applicable

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5. How often do you seek or receive advice on business decisions from from sources outside your business?
- Never. We don't seek advice.
 - Once a year.
 - Two or three times a year.
 - Four to six times a year.
 - Seven to twelve times a year.
 - Two to three times a MONTH.
 - Once or twice a WEEK.
6. In preparing for the upcoming season, I have done the following: (Circle all that apply)
- Compared projections against last year's actuals
 - Revisited my business plan and your farm's mission and values
 - Developed a long-term strategy
 - Researched new products and their projected profitability
 - Evaluated current markets and researched new ones
 - Created a list of possible risks and thought of ways to address or avoid them
 - Use benchmarks to determine sales projections
 - _____ (fill in the blank)
7. Indicate how you have used your business plan in the last year. (Circle all that apply)
- I never look at my business plan.
 - I look at it once a year to reflect on the past season
 - I use it to plan for the upcoming season
 - I use it continuously as a living document to guide me throughout the season
 - _____ (fill in the blank)
8. Have you sought financing during 2015?
- Yes
 - No

I came to this decision by... (Circle all that apply)

- Projecting operating capital needed for next season
- Examining profitability of different enterprises or products and determining which one to invest in growing.
- Calculating a reduction in labor or other expenses that would be achieved with the investment.

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- D. Needing to replace or upgrade old equipment
- E. _____ (fill in the blank)
9. How confident/prepared do you feel to evaluate different funding opportunities based on your assessment of your farm business' growth and capital needs?
- A. I will NEVER use financing as there are NO funding opportunities that I know of available to me.
- B. I will NEVER use financing because I do not believe in using debt to grow my business.
- C. I am HESITANT to take out any financing as I am not sure what funding opportunities are available to me.
- D. I am CONFIDENT using financing to grow my farm, but I am NOT CONFIDENT on which funding opportunities are most appropriate for me.
- E. I am VERY CONFIDENT that I will be able to find appropriate financing and/or have done already so.
10. Which of the following best describes your farm's MAIN operation?
- Crop Production:
- A. Oilseed and grain farming
- B. Vegetable and melon farming
- C. Fruit and tree nut farming
- D. Greenhouse, nursery, and floriculture production
- E. _____ (fill in the blank)
- Animal Production:
- F. Cattle ranching and farming
- G. Hog and pig farming
- H. Poultry and Egg production
- I. Sheep and Goat farming
- J. Animal Aquaculture
- K. _____ (fill in the blank)

If you circled a category in crop production, please list your top three crops:

- 1.
- 2.
- 3.

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11. What was your gross and net FARM income in 2015?

Gross Farm Income:

- A. Less than \$1,000
- B. \$1,000 to \$2,499
- C. \$2,500 to \$4,999
- D. \$5,000 to \$9,999
- E. \$10,000 to \$24,999
- F. \$25,000 to \$49,999
- G. \$50,000 to \$99,999
- H. \$100,000 to \$249,999
- I. \$250,000 to \$499,999
- J. \$500,000 to \$999,999
- K. \$1,000,000 or more

Net Farm Income:

- A. Less than \$1,000
- B. \$1,000 to \$2,499
- C. \$2,500 to \$4,999
- D. \$5,000 to \$9,999
- E. \$10,000 to \$24,999
- F. \$25,000 to \$49,999
- G. \$50,000 to \$99,999
- H. \$100,000 to \$249,999
- I. \$250,000 to \$499,999
- J. \$500,000 to \$999,999
- K. \$1,000,000 or more

12. What is your age?

- A. Under 25 years
- B. 25 to 34 years
- C. 35 to 44 years
- D. 45 to 54 years
- E. 55 to 64 years
- F. 65 to 74 years
- G. 75 years and over

13. I identify my gender as...

- A. Man
- B. Woman
- C. Trans
- D. _____ (fill in the blank)
- E. Prefer not to disclose

14. I identify my race as...

- A. American Indian or Alaskan Native
- B. Asian
- C. Black or African American
- D. Latino or Hispanic American
- E. Native Hawaiian or Other
- F. Pacific Islander

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- G. White
- H. More than one race or ethnic group
- I. _____ (fill in the blank)
- J. Prefer not to disclose

Thank you for your time!

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POST-WORKSHOP EVALAUTION SURVEY

Dear MIH Participant,

Thank you for participating in the Making It Happen workshop! We hope you found this workshop challenging, helpful, and enjoyable. To determine the effectiveness of this workshop, we ask you to fill out the following survey as your feedback is often the most important and useful feedback we will receive.

We will also be sending out periodic tips, tools, reminders, and resources to help reinforce the topics covered today. All participant information collected will be kept strictly confidential, and used only anonymously and solely for the purposes of this project. All educational and training materials developed as a result of this project will be available to participants. We greatly appreciate your time and assistance!

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Post-Workshop Survey:

In this workshop we introduced 5 major financial management tools. Please let us know how valuable you think each one will be for your work in the future.

CIRCLE ONE DESCRIPTION WITHIN EACH ROW

Budgeting for Profit	Critical to My Success.	Helpful to My Success.	Not Significantly Helpful
Scenario Planning	Critical to My Success.	Helpful to My Success.	Not Significantly Helpful
Break-even Analysis	Critical to My Success.	Helpful to My Success.	Not Significantly Helpful
Sensitivity Analysis	Critical to My Success.	Helpful to My Success.	Not Significantly Helpful
Competitive Analysis	Critical to My Success.	Helpful to My Success.	Not Significantly Helpful

Consider the financial management tools you've learned about in this workshop, HOW ABLE ARE YOU to put those tools into practice on your farm?

A. I'm NOT AT ALL ABLE to put the tools into practice.

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- B. I have GENERAL AWARENESS of the tools taught, but I WILL NEED MORE TRAINING / PRACTICE / GUIDANCE / EXPERIENCE TO DO ACTUAL JOB TASKS using the tools taught.
- C. I am ABLE TO WORK ON ACTUAL JOB TASKS, but I'LL NEED MORE HANDS-ON EXPERIENCE to be fully competent in using the tools taught.
- D. I am ABLE TO PERFORM ACTUAL JOB TASKS at a FULLY-COMPETENT LEVEL in using the tools taught.
- E. I am ABLE TO PERFORM ACTUAL JOB TASKS at an EXPERT LEVEL in using the tools taught.

Now that you've participated in the Making It Happen workshop, how well do you understand the various business decision-making strategies taught?

- A. I have some significant CONFUSIONS AND/OR BLIND SPOTS.
- B. I have a BASIC FAMILIARITY with the concepts.
- C. I have a SOLID UNDERSTANDING of the concepts.
- D. I have a COMPREHENSIVE UNDERSTANDING of the concepts.
- E. I have an EXPERT-LEVEL UNDERSTANDING of the concepts.

In regards to the financial statements taught and explored in this workshop, how motivated WILL YOU BE to UTILIZE these statements in your work?

- A. I will NOT MAKE IT A PRIORITY to check and use my financial statements
- B. I will make this a PRIORITY – BUT A LOW PRIORITY – updating and using my financial statements to make decisions VERY INFREQUENTLY.
- C. I will make this a MODERATE PRIORITY and update and use my financial statements to make decisions EVERY COUPLE MONTHS.
- D. I will make this a HIGH PRIORITY and will update and use my financial statements to make decisions MONTHLY.
- E. I will make this one of my HIGHEST PRIORITIES and will update and use my financial statements to make decisions WEEKLY.

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How prepared are you to apply the skills and tools from this training to real work situations? Select as many as are true.

- A. I AM CONFIDENT that I can successfully use these skills/tools, because between the start and end of training I ACTUALLY USED THESE SKILLS/TOOLS IN DOING REAL WORK.
- B. I AM CONFIDENT that I can successfully use these skills/tools, because the TRAINING CHALLENGED ME MANY TIMES WITH DIFFICULT JOB-RELATED TASKS.
- C. I AM CONFIDENT that I can successfully use these skills/tools, because the training provided me with PRACTICE ON REALISTIC JOB-RELATED TASKS.
- D. I AM CONFIDENT that I can successfully use these skills/tools, even though the training DID NOT PROVIDE MUCH PRACTICE ON REALISTIC JOB-RELATED TASKS.
- E. I AM NOT VERY CONFIDENT that I can successfully use these skills/tools.
- F. I HAVE ZERO CONFIDENCE that I can successfully use these skills/tools.

After taking this workshop, how confident/prepared do you feel about evaluating different funding opportunities based on your assessment your farm business' growth and capital needs?

- A. I AM VERY CONFIDENT that I am able to assess when I should seek funding and AM VERY CONFIDENT determining how I can access those resources
- B. I AM CONFIDENT that I am able to assess when I should seek funding, but I am NOT CONFIDENT determining how I can access those resources.
- C. I AM NOT CONFIDENT that I am able to assess when I should seek funding, but I AM CONFIDENT determining how I can access those resources, if needed.
- D. I am NOT VERY CONFIDENT that I am able to assess when I should seek funding or to determine how to access those resources.
- E. I HAVE ZERO CONFIDENCE that I am able to assess when I should seek funding or to determine how to access those resources.

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Which of the following were true about your course instructor(s)? Select all that apply.

- A. Generally PERFORMED COMPETENTLY AS A TRAINER.
- B. Exhibited LACK OF REAL-WORLD EXPERIENCE.
- C. Was OFTEN UNCLEAR or DISORGANIZED.
- D. Showed DEEP SUBJECT-MATTER KNOWLEDGE.
- E. Demonstrated HIGH LEVELS OF REAL-WORLD EXPERIENCE.
- F. Was OFTEN SOCIALLY AWKWARD OR INAPPROPRIATE.
- G. MOTIVATED ME to ENGAGE DEEPLY IN THE LEARNING.
- H. Exhibited UNACCEPTABLE LACK OF KNOWLEDGE.
- I. Is a PERSON I CAME TO TRUST.

**What was good about the course, that we definitely ought to keep for future workshops?
(NOTE: Your comments are often the MOST important feedback we get, so please tell us what you think!)**

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What should we do to improve the workshop?

Is there anything else you'd like to tell us?

Thank you for your time!

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