

On Farm Resource Team Guidelines

These are the guidelines for the 2018-2019 On Farm team programs. Any questions regarding any of the points below should be referred to Melissa Anderson at 717-346-0849 or email: manderson@centerfordairyexcellence.org

1. *What are the funding levels for 2018-2019 grants? (Grant period is July 1, 2018 – May 31, 2019)*
 - **Profit Team:** \$2000 – with in kind or financial match demonstrated – May only receive \$2000 in funding for 3 consecutive years, if already received funding for three consecutive years, receive 50% funding at \$1000 for 1 additional year.
 - **Transition Team:** \$3000 - with in kind or financial match demonstrated – May only receive funding for 2 consecutive years, new business structure can then apply for a new type of team for 1 more additional year.
 - **Transformation Team:** \$5000 – with in kind or financial match demonstrated – May only receive funding for 2 consecutive years for same project. May apply for a new type of team for 1 more additional year. Application to be reviewed prior to approval. Grant requests will only be approved for planning purposes, not compliance.

2. *What are some of the **basic ground rules** of a team meeting?*
 - The meeting (suggested 90 minutes) will begin and end on time.
 - Team members have been selected as trusted advisors of the farming operation and for that reason will be expected to contribute for their experience, enter into a positive discussion and seek future beneficial direction for the operation.
 - Members of the team must be considerate of sensitive information and regard confidentiality as a high priority.
 - Everyone on the team is expected to contribute to the discussion. No single person will dominate the overall meeting.
 - Discussion and ideas that become part of the meeting but are not time sensitive and critical to the pre-meeting agenda should be placed on hold for a future meeting agenda and addressed in meeting notes. (see agenda template)
 - Team members agree to complete assigned tasks such as developing cash flow projects, researching additional options and opportunities.

3. *What does a **typical agenda** look like for a team meeting? (Agenda template attached)*
 - Welcome, Introductions, family/partnership news, challenges
 - Review of the previous meetings notes
 - Reporting from assigned tasks
 - Updates: herd performance, crops, other
 - Financials: cash flow, balance Sheet, other
 - Roundtable discussion on the various areas of the operation that can be addressed by the team
 - Review action items, assigned tasks and set next meeting date, time, place

4. *Reimbursement Procedures:*
 - Meeting notes must be submitted with expenses for the expenses to be reimbursed (See Team Meeting Agenda Template)
 - Expenses will be reimbursed to producer only
 - Invoices for each of the expenses sent to the Center for Dairy Excellence must be submitted with a completed CDE expense form before **May 31, 2019**.
 - In kind and financial contribution columns to be completed (See sample for completion)
 - Team member invoices must show hours worked and description of service
 - Meeting notes, invoices/expenses and expense form to be sent to: Center for Dairy Excellence, Attn: Melissa Anderson, 2301 N Cameron Street, Harrisburg, PA 17110
 - For questions on reimbursement, please contact Melissa Anderson 717-346-0849 or email: manderson@centerfordairyexcellence.org

5. What expenses are considered to be eligible team expenses for reimbursement?

- **Team member time:** The consultant's time may be in-person one to one meetings or consultation via email or phone.
- **Team member mileage:** Consultant travel to the team meeting, driver expenses for Plain Sect, team member travel to other farm locations within the state of Pennsylvania (recommendation to travel to the site should be reflected in the meeting notes)
- **Producer registration** for educational conference, workshops, meetings and training:
 - Succession planning workshops, AgBiz Masters, Farm\$en\$e, QuickBooks, Start-up cost associated with DHIA, etc. (recommendation to attend/enroll in these educational events should be reflected in the meeting notes)
- **Feasibility studies, cash flow analysis, business plan** to explore expansion or modernization
- **Site survey, permit development and permitting fees**, if all other questions have been answered.
- **Attorney or accounting fees** associated with farm transition
- **Discovery related costs as recommended by team** to identify solutions or address bottlenecks:
 - Culturing to identify bacteria causing high SCC or mastitis, testing to identify feeding or water quality issues, stray voltage testing
 - One-time only report for DHIA, PC Dart, SPR etc. for baseline determination
- **Request for reimbursement for a unique team expense should be forwarded to Melissa Anderson with explanation with approval.**

6. The following list of ineligible team expenses for reimbursement is not an all-inclusive listing. These expenses incurred may be applied to farm match if they are recommended by team and documented in meeting notes. Please contact the CDE if you have a question about a potential ineligible expense and farm match under the On-Farm Resource Teams programs:

- Consultant expenses to attend educational conference, workshops, meetings and training.
- Software purchase, computer and printer hardware, monthly or annual internet connection.
- Travel:
 - Producer travel to annual producer events for the general public such as but not limited to (Keystone Farm Show, Ag Progress Days, PA Farm Show, etc.).
 - Air flights.
 - Travel expenses outside of Pennsylvania.
- Routine DHIA testing, commodities, soil and manure testing and accounting fees to complete yearly taxes.
- Equipment & Supplies
- Determining price comparisons between competing entities (engineering firms, Nutrient Management Planners, etc.)
- Pre-payment of feasibility studies, cash flow development, etc. unless approved by Melissa Anderson.

7. May I have multiple teams in a fiscal year?

- No, only one type of On-Farm Resource Team is available per fiscal year from the CDE. Select working with one of the three types of teams depending on your need and best fit for your current situation. Special request from a dairy farmer to the CDE to consider a hybrid or crossover team approach must be forwarded to Melissa Anderson and noted on application. Farms allowed to have a team for three consecutive years, must then have two years off before reapplying for another team.

8. Once enrolled into the program, additional programs available to the team.

- Dairy Trend Analyzer Program
- PA Dairy Tool
- Farm Margin Tool App
- Milk Production Record & Feed Records for Management Control
- DairyCents & CropCents Mobile Apps

Profit & Transformation Teams: **Melissa Anderson**, CDE office, 717-346-0849, manderson@centerfordairyexcellence.org
 Transition Teams: **Charlie Gardner**, 717-816-4246, or dairymancon@ptd.net