



Framework for Shared Measurement

An evaluation guide for
Incubator Farm Projects

Developed by the National Incubator Farm Training Initiative (NIFTI)

Published by the New Entry Sustainable Farming Project (New Entry)



This material is based upon work supported by the National Institute of Food and Agriculture, U.S. Department of Agriculture, through the Northeast Sustainable Agriculture Research and Education program under subaward number ENE14-132.



Introduction

As any farmer or farm-based educator knows, farming requires a diverse set of skills ranging from science to sociability. Many Incubator Farm Projects (IFPs) do not have sufficient resources, time or in-house expertise to train participants on all of the skills that make for a successful farmer, and therefore must prioritize what skills can or should be taught in a limited period of interaction with an aspiring farmer. Often, production-oriented training is highlighted for new farmers and on many IFPs, and is the subject that instructors and participants most enjoy. However, production skills alone do not ensure farmer success, and that's where this tool comes in!

This multi-level survey tool is designed to assist IFPs in identifying and evaluating core non-production skills by focusing on outcomes necessary for farmers to run their own farm businesses after graduating from the IFP. NIFTI's hope is that this specific tool can support your project in providing the best opportunities for success possible for your participants during the time you have with them, and gently guide your project towards measuring a set of core skills that have been determined to be of particular importance to successful commercial farmers. Our vision is that IFP's can focus their training on core skills that are realistically achievable given time and resource constraints, and work to connect participants with the mentors and communities that will supplement learning on the IFP and support them as they grow.

The Framework for Shared Measurement can jumpstart new conversations and inform existing dialogue about program evaluation. Data from the Shared Framework also serves to direct the National Incubator Farm Training Initiative (NIFTI) in its training programs by identifying trends in IFP needs. Finally, the Shared Framework can help programs advocate for continued support by reporting on the collective impact of IFPs.

In introducing this tool, it is important to acknowledge that there are many ways to evaluate the success of Incubator Farm Projects (IFPs) and their participants. While one of the most explicit missions of IFPs, and the focus of this tool, is to train the next generation of farmers to run viable independent farm businesses, everyone who participates in an Incubator Farm Project doesn't achieve this. This does not necessarily mean that they have failed, or that a project has failed them. There many other metrics of success, such as leadership development, social and psychological benefits of participation and graduating farmer participation in the food system in roles other than a primary farm operator. As this field of work continues to grow, so too will our capabilities to measure the wide variety of outcomes associated with participation in an IFP. NIFTI encourages thought and dialogue on these possibilities, and hopes that you will be in touch if you've been working in this area.

Development of this Tool

To create the Shared Framework for Evaluation, New Entry facilitated conversation between over 20 people from 12 IFP's over the course of two years to brainstorm core skills every farming graduate from an IFP should have. We grouped together common themes and designed questions to be as clear and concise as possible. We then consulted with a food systems evaluation professional, Lydia Oberholtzer of Community & Food Systems Resources, to review and refine our work. After this review process, we sent the draft version of the framework to 10 IFP's who provided feedback on the experience of using the tool, which we then incorporated. We hope that this process of feedback and revision will be ongoing, and encourage you to be in touch about how we may improve this resource for use in future years.

The Shared Framework for Evaluation is a multilevel survey tool, meaning it asks for input first from farmers, and then from program staff. IFP's distribute the Farmer Survey to farmers, collect their data, then compile it into one general Incubator Farm Project Report for the entire Project. The Farmer Survey is a PDF form that can be filled out digitally or manually, and the aggregated Incubator Farm Project Report can be submitted [here](#). To ease the process of compilation, we have developed an Excel

Calculator tool that allows you to input numerical data from the Farmer Survey and easily determine averages for the whole farm.

We strongly encourage you use the Framework for Shared Measurement to supplement your own evaluation. We hope that you can use this tool as best suits your needs, which may mean merging it with an existing evaluation tool, or adding, altering, or deleting questions. If you do decide to change questions and are planning on reporting your results to NIFTI through completion of the Incubator Project Report, we ask that you preserve a few important questions as written. In both the Farmer Survey and the Incubator Farm Report we have highlighted in orange the questions that must be asked verbatim to ensure consistent reporting. Whether you use the whole tool, incorporate part of it, or simply let the suggestions guide your own evaluation, we hope that it will encourage reflection on your program's structure and delivery and open space for dialogue with your farmers.

If you are just starting to develop an evaluation framework for your program, we highly encourage you to consult NIFTI's [Guide to Metrics and Evaluation for Farm Incubators](#)¹.

For more information about the development or use of this tool, please contact [Brianna Bowman](#).

¹ NIFTI's [Guide to Metrics and Evaluation for Farm Incubators](#) is a comprehensive guide to creating evaluation tools; it includes a list of potential metrics for success and example evaluation tools.

FARMER SURVEY

Name:

Date:

To be completed by
Incubator Farm Project Participants

Connections

Mentors: Farm staff and other individuals who provide technical assistance, consultation, and/or guidance

1. Rate your level of satisfaction with the amount of on the ground technical assistance provided by the Incubator Farm staff: ²

Very **Somewhat** **Not At All**

2. Approximately how many hours of consultation and technical assistance did you receive from your Incubator Farm staff in the previous season? _____

3. In which areas did you receive mentorship from Incubator Farm staff?

- Business Planning
- Marketing
- Farm Management
- Financial Planning
- Equipment Selection and Maintenance
- Equipment Operation
- Organic Production
- Crop Production
- Livestock Production
- Environmental Issues (water, soil, air, wildlife)
- Pest Management
- Fertilizer and Pesticide Use
- Other _____

² Note: Some questions are orange for reporting purposes

4. In which additional areas would you like to receive mentorship from Incubator Farm staff?

5. Please describe any mentorship you receive from individuals aside from Incubator Farm staff.

Lenders: Source of financing

6. Have you been in contact with lenders about developing your future farm business?

- Yes** **No**

7. Did this contact result in receipt of approved financing?

- Yes** **In Process** **No** **No, but I plan to apply**

8. What other sources of financing will help you develop your farm business?

Markets

9. Where do you sell your products?

- | | |
|---|--|
| <input type="radio"/> Grocery/food stores
How many accounts? | <input type="radio"/> Emergency Food Assistance Outlets
such as food banks or pantries (include
sales only, not donations)
How many accounts? |
| <input type="radio"/> Restaurants and Caterers
How many accounts? | <input type="radio"/> Processors
How many processors? |
| <input type="radio"/> Institutional Food Service (Schools,
Colleges and Universities, Hospitals,
Nursing Homes, Government, etc.)
How many accounts? | <input type="radio"/> Distributors
How many distributors? |
| <input type="radio"/> Direct Retail (CSA, Food Box Program,
Farmer's Market, Mobile Market, Own
Retail Site, Online, etc.)
How many accounts? | <input type="radio"/> Other |

10. What are your top three most important market outlets?

- 1.
- 2.
- 3.

11. Do you feel that you have access to adequate market opportunities?

- Yes No

12. What additional market channels are you interested in developing?

Community Partnerships and Outside Support:

Organizations independent of the Incubator Farm who are helping you establish your farm business

13. Please select the organizations with which you work to develop and/or run your farm business:

- Ag Service Providers (organizations or individuals that provides technical assistance)
- Land Access and Preservation Organizations (organizations that help you find and secure land)
- Foundations and Alternative Financing Partners (sources of finance that are not a corporation or government agency)
- Town Officials (people who work for the city or state)
- Licensed Professionals (realtor, lawyer, developer)
- Others

14. Please briefly describe your partnership with the organizations you selected.

15. Do you have access to suppliers of all the tools and materials necessary to run your farm? (equipment, inputs, seeds, etc.)

- Yes** **No**

16. Is there anything you wish to share about your access to suppliers of all the tools and materials necessary to run your farm? (equipment, inputs, seeds, etc.)

Resources

Bank Account

17. Do you have a separate bank account for your farm business?

- Yes No I Don't Know

Financing

18. Do you feel prepared to access the financing necessary to transition your farm business off of the incubator?

- Yes No I Don't Know

19. What additional skills and information will help you obtain the financing necessary to transition your farm business off of the incubator?

Value-added

20. During the previous season, did you produce value-added products?

- Yes I Plan To No

21. Are you connected to a place where you can produce value added products?

- Yes No I Don't Know

22. Rate your level of familiarity with the regulatory requirements for value-added food processing.

- High Medium Low I Don't Know
-

Farm Documents

Enterprise Budgets

23. Have you created an enterprise budget since enrolling in the Incubator Project?

- Yes
 No
 I Don't Know

24. Rate your level of comfort in using an enterprise budget to make product pricing decisions.

High
 Medium
 Low
 I Don't Do This

-

Business Plan

25. Which elements of a business plan have you completed?

- Executive Summary
 Marketing Plan
 Business Description
 Legal Structure & Management Team
 Production Plan
 Financial Summary

26. Rate your level of satisfaction with each element of your business plan.

	High	Medium	Low	I Don't Have This
Executive Summary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business Description	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Production Plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing Plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legal Structure & Management Team	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial Summary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

26. How often do you review and update your business plan?

Financial Statements

27. Please select the Financial Statements that you currently use:

- Balance Sheet (shows assets, liabilities)
- Income Statement (shows revenues, expenses, gains and losses)
- Statement of Cash Flows (shows changes in cash flow)

28. Rate your level of ability with each financial statement:

	High	Medium	Low	I Don't Do This
Balance Sheet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Income Statement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Statement of Cash Flows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

29. How important are each of the following financial Statements to your farm management?

	High	Medium	Low	I Don't Do This
Balance Sheet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Income Statement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Statement of Cash Flows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Tax Returns

30. Was your farm business active during the previous season?

- Yes No

31. If yes, did you file business taxes? Yes No I Don't Know

Land Search

32. How confident are you with your ability to complete the following:

	High	Medium	Low		I Don't Have This
List of Capital Needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Land Search Plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Farm Lease from a Template	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Skills

33. Rate your level of ability with:

	High	Medium	Low		I Don't Do This
Bookkeeping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Systematic Recordkeeping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Crop Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If you raise livestock (if not leave blank):					
Grazing Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Articulating Land Needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessing Farmland as a Potential Site for Your Farm	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

34. How important is each of the following skills to your farm management?

	High	Medium	Low	I Don't Do This
Bookkeeping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Systematic Recordkeeping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Crop Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If you raise livestock (if not leave blank):				
Grazing Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

35. Have you developed a farm systems plan?

- Yes No I Don't Know

36. If yes, what aspects of farm management does your plan include?

Reflection

37. What goals do you hope to achieve by the end of your time on the incubator farm?

38. What additional skills do you want to develop during your time on the incubator farm to help you achieve these goals?

39. What additional support would you like to receive from the Incubator Farm Project to help you achieve these goals?

40. Is there anything else you would like to share?

INCUBATOR FARM PROJECT REPORT

To be completed by
Incubator Farm Project Staff after collection and
analysis of Farmer Surveys

You may use the accompanying calculator tool to
determine averages for aggregate responses in
orange.



Incubator Farm Project Report

Instructions:

Assign the following values to responses:

	Very	Somewhat	Not At All		
	0	0	0	0	0
	5	4	3	2	1
High		Medium	Low	I Don't Do This	
0	0	0	0	0	0
6	5	4	3	2	1
	Yes	No			
	0	0			
	1	0			
	Yes	In process/ I plan to	No	I don't know	
	0	0	0	0	
	1	1	0	0	

Total the selections, divide by number of responses, and only for percentage questions multiply by 100. The Excel Calculator tool will help with such calculations. Indicate the number average in the questions below and submit your results through the [online form](#).

The questions in orange should be asked verbatim as they require the use of shared metrics for accurate reporting. The questions notes next to the orange text indicate which question on the Farmer Survey you will pull this information from.

Connections

Mentor

1. On average, how satisfied are your farmers with the amount of mentorship and on the ground technical assistance provided by Incubator Farm staff? (Q1)
2. In which additional areas would your farmers like to receive mentorship from Incubator Farm staff?
3. Which mentorship opportunities independent of the Incubator Farm do your farmers maintain?

Lender

4. Does your Incubator Farm Project link farmers to lenders?
5. What percentage of your farmers received or are in the process of receiving approved financing?

Markets

6. How many distinct markets do your farmers access?
7. What percentage of your farmers feel that they have access to adequate market opportunities? (Q11)
8. What additional market channels are your farmers interested in developing?

Community Partnerships and Outside Support

9. What community partnerships do your farmers maintain?
10. What relationship does your Incubator Farm Project have with these organizations/individuals?
11. What percentage of your farmers have access to suppliers of all the tools and materials necessary for running their farms?

Resources

Bank Account

12. What percentage of your farmers has a separate bank account for their farm business?

Financing

13. What percentage of your farmers feels prepared to access the financing necessary to transition their farm business off of the incubator? (Q18)

Value Added

14. During the past season, what percentage of your farmers produced or planned to produce value-added products?
15. What percentage of your farmers has connections to a place where they can produce value-added products?

16. On average, how familiar are your farmers with the regulatory requirements for value-added food processing? (Q22)

Farm Documents

Enterprise Budgets

17. What percentage of your farmers has created an enterprise budget since enrolling in the Incubator Farm Project?

18. On average, how comfortable are your farmers using an enterprise budget to make pricing decisions? (Q24)

Business Plan

19. On average, what level of satisfaction do your farmers possess with each aspect of their business plan? (Q25)

Executive Summary

Business Description

Production Plan

Financial Statements

Marketing Plan

Legal Structure & Management Team

Financial Summary

20. On average, what level of ability to do your farmers possess with each financial statement? (Q28)

Balance Sheet

Income Statement

Statement of Cash Flows

21. On average, how important are each of the following financial statements to your farmers? (Q29)

Balance Sheet

Income Statement

Statement of Cash Flows

Tax Returns

22. What percentage of your farmers who were farming last season filed business taxes for that season?

Land Search

23. On average, how confident are your farmers with their ability to complete the following? (Q32)

List of Capital Needs

Land Search Plan

Farm Lease from a Template

Skills

24. On average, what level of ability do your farmers possess with the following skills? (Q33)

Bookkeeping
Systematic Recordkeeping
Crop Planning
Grazing Planning (if farmers do not raise livestock, answer N/A)
Articulating Land Needs
Assessing Farmland as a Potential Site for their Farm

25. On average, how important is each of the following skills to your farmers' farm management? (Q34)

Bookkeeping
Systematic Recordkeeping
Crop Planning
Grazing Planning (if farmers do not raise livestock, answer N/A)

26. What percentage of your farmers has developed a farm systems plan?

Reflection

41. What additional support would your farmers like to receive from the Incubator Farm Project to help them achieve their goals?

42. Is there anything else your farmers would like to share?

43. Do you feel that your farmers will have the connections, resources, documents and skills necessary to identify and secure appropriate land and operate an independent farm business upon graduation from you program?

44. Based on the information gathered to complete this report, which areas of your program do you feel are particularly strong?

45. Which areas need improvement?

46. What are three concrete actions that you can take in the next year to begin to achieve this improvement?

