

The Power of Groups

A farmer's guide to working
in small groups for better
results

Agricultural Management Institute
PROSPEROUS FARMS THROUGH BUSINESS MANAGEMENT
BEST PRACTICES, COOPERATION AND INNOVATION

Second Edition – September 2010

Canada 



 Ontario

Growing Forward 

This Booklet is designed to provide direction, useful hints and inspiration to farmers who may be considering the idea of small farmer-led groups as a new approach to management. It is hoped that this tool will demonstrate the benefits of working in small groups, whether they relate to profitability, quality of life, information-sharing or knowledge development. This Booklet shares the advice of experienced agricultural producers on how to form a group that can help improve your bottom line.

Please note that the Agricultural Management Institute (AMI) has a full-length companion document, called “Farmers Working in Small Groups – A Resource Guide”. It describes how the need for this type of guide was identified by agricultural producers and the process for garnering the advice and wisdom of experienced groups. It contains additional details on the topics covered in this Booklet, as well as case studies, websites and other resources. It is recommended reading for group leaders, facilitators or advisors.

The Agricultural Management Institute (AMI) is funded by the Canada-Ontario bilateral agreement to implement Growing Forward, a Federal-Provincial-Territorial initiative. The AMI is part of the Best Practices Suite of programs for Growing Forward Ontario.

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The Power of Groups – A Farmer’s Guide to Working in Small Groups for Better Results, 2008
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PART A

First Steps in Starting a Farmer-Led Group

The Best Practice of Leading Farmers project found that 95% of producers belonged to some industry or community association. Two of the major benefits of belonging to such an organization included networking opportunities and access to information. Top producers recognize the value of networking or interacting with other people who have similar interests.

“Best Practices of Leading Farmers, Phase II”
Saskatchewan Agrivision Corporation, August 2006

Why work in groups?

Farmers have valuable expertise, especially about “what really works” on the farm. Small groups multiply the value of that knowledge as they trade experiences with other farmers, or engage in joint strategizing and problem-solving. The group context increases the ability to learn from farm advisors or written materials. If two heads are better than one, just imagine the power of groups!

A group usually starts with a few farmers who need to solve a common problem, access a market together, or compare notes to improve some aspect of farm management. They recruit others and form a group. Their need is to overcome obstacles and create new solutions. Along the way, they discover that sharing concerns and tackling projects together is a satisfying experience on a personal as well as professional level. And, bottom line, it pays!

One large producer started by saying he couldn't afford to come to the meetings. After he participated, he said he couldn't afford not to go to meetings.

*Margaret Appleby
Durham Apple Study Group
Ottawa AMI Symposium*

There are many types of groups. The most common types are: the Technical Support Group; the Marketing Group; the Benchmarking Group; the Management Group; the Multi-Service Group, the Co-operative and the Innovation Group. These are described in Appendix I, “Different Groups for Different Needs”.

There is power in groups – creative power, knowledge-based power and experience-based power. Corporations leverage their human assets for increased profitability, the ability to compete, and to forecast the future or implement change. Agricultural producers can get the same benefits through a group.

Here are some of the most common reasons to be in a group:

- Accessing the “real life” experts: **farmers trust the experience and knowledge of other farmers** who deal with the same situation.
- Improve operations: **keep up-to-date** on the latest industry trends, new technologies and management techniques.
- A **proven economic benefit**. Research shows that farm businesses that have been members of management groups for a number of years show an operating profit that is 43% higher, a return on assets that is 2.2% higher and a higher net worth¹.
- **Increase knowledge** through sharing with other farmers or seeking outside expertise.
- Bring different sets of knowledge and experience together, for **group problem-solving**.
- **Quality of Life**: providing for personal and family time has become a management issue for producers, so many groups include this in their discussions.
- Last, but not least, it's an enjoyable experience. Groups provide busy farmers with a much-needed opportunity for **social interaction** and **support from like-minded people**.

¹ “Agricultural Council Groups”, by Richard Robert, President, Fédération des groupes conseils agricoles du Québec, PowerPoint presentation prepared for the Ottawa Think Tank Symposium.

Sometimes, a spark is all that's needed...

Forming groups is a natural process, and it often begins with a simple conversation that lights a spark and grows from there.

A group may emerge from a crisis or other **difficult situation**. A new pest threatens your crops, or a proposed local regulation would interfere with your business. You mention it to other farmers. You realize it affects many people and you have to act quickly. You suggest a kitchen table meeting, followed by a larger meeting to which you invite outside expertise. You realize that **together you can make a difference**. Somebody brings up another issue that is looming. The first thing you know, you're a group with regular meetings!

Great Idea! Let's meet again and see where it goes...

Sometimes it starts with the spouses. At the annual picnic or a party, they start talking about stress. They realize one way to a happier management team might be to get together with others who are facing a similar situation. They invite others and a group gets started.

Sometimes, it just dawns on you. You hear a report on TV or read something in a farm magazine and it connects to something in the back of your mind. You start looking around and realize you are not the only one facing this issue. It doesn't seem like anybody is doing anything about it. At some point, you realize you won't get the answer talking to yourself.

Wherever the initial spark comes from, it may ignite a fire that will provide the motivation to create a group. If you are the one holding the match, the following pages build on the experience of other agricultural producers on how to transform that initial flicker of interest into a fire.

Before you begin: preparing the field to sow the seeds...

Every situation is a bit different, so perhaps not all the points in the following list will apply to your situation, but there is nothing like being prepared. The efforts invested prior to establishing a group may be the best guarantee of its eventual success. Try to answer the following questions. Don't worry about planning every detail, because things will evolve as you progress. But do think about these points.

- ✓ **What are the group's purposes?**
- ✓ **Who should be in the group, and why?**
- ✓ **How will potential group members be contacted?**
- ✓ **Will group membership be open or closed?**
- ✓ **How much structure and formality does the group need?**
- ✓ **How will the group make decisions?**
- ✓ **Who will provide support functions for the group?**
- ✓ **Where should meetings be held?**
- ✓ **How will the costs be met?**

You don't need to answer all these questions before starting a group. But thinking about them will definitely help.

Answering all or some of these questions will indicate your readiness to start a farmer-led group. You will find a short discussion on each item in Appendix II and a "Readiness Worksheet" in Appendix III.

Recruiting Members... Selling your idea

Start with a "champion"

A range of strategies can be used in the formation of groups, but **personal approaches** are generally more effective. So identify a local 'champion' (or more than one champion), usually a producer who is respected and who can make the initial invitation to a meeting. Local champions are most effective agents in the formation of networks.

Contacting potential members... what to say when recruiting members

- **Use a one-on-one approach**; knowing about farmers' operations will help you present the value of a farm management group in terms they can relate to.
- Talk about how it can lead to **cost savings**, or **new revenue streams**, or improvements to their **quality of life**.
- Have some **facts** readily available. Give **examples** of other groups and their successes.²
- Say the first meeting is to **explore the idea**; then, members can decide whether to join or not.
- **Mention the names of others** who have agreed to come.

Group members must see personal value for their investment in time or money.

² Facts and examples are found in the companion document for this Booklet, "Farmers Working in Small Groups – A Resource Guide", Agricultural Management Institute.

Don't just talk. Listen. What needs or ideas do producers mention? Might the group help with that? Would a survey of potential members help you learn what they need and what information they want, or is that too formal?

- Never argue, but **be convincing**.
 - Be **clear** about the focus and time commitment involved.
 - **Value the input** of a prospective member. Make the point that the producer, in becoming a member, also becomes a partner to all others.
 - Farmers are naturally curious, so mention that they **can catch up on the news**.
- Every farmer is an innovator, adapting techniques and methods. This is their chance to visit other farms. According to the nature of the person you are talking to, tell them they can **share their success** or that they can see someone else's first hand.

But at some point, it's OK to stop recruiting. It's better to start with a smaller group of people who seem open to the idea than to try to convince everybody to join. Don't oversell the value of group membership and be realistic. Once you have a **core group** formed, you can invite members more selectively.

Ten tips for starting off on the right foot

It is important to note that small farmer-led management groups are highly diversified. They range from informal groups that focus on technology transfer and best practices, to groups exchanging benchmarking data, to groups focused on gaining access to new markets. Many short-term groups operate without any outside support, other groups access free advice and support from government or university staff, and many of the larger or longer lasting ones have part-time staff or consulting advice.

There is no "pat formula" for starting a group. Every situation is different. However, if you want there to be a second meeting, consider the Ten Tips before the first meeting.

The point is that there are many ways to organize a group. However, experienced agricultural producers who were consulted in the preparation of this guide agreed on ten winning conditions that can make your job easier, and increase the chances of success. Here are some ideas to think about before you call the first meeting.

1. Peers: the group needs to be composed mainly of farmers

The producer group should have **something in common**, for example, from the same production sector; experiencing similar challenges or needs; somewhat similar farm size or structure; similar business goals or similarity of participants as the group matures. Within the group, each participant must be considered as an expert in his own right and contribute in the exchanges among producers. Exchanges are the glue that holds the group together.

2. Leadership, vision, and a local champion

The initial leadership usually comes from two or three producers who are respected by their community and are dedicated to forming a group to get results. Whoever takes the lead should have a **vision** and will take time to recruit others. It is important that the group be farmer-led. Most leaders seem to ensure that every member of the group provides a creative or knowledge contribution to the entire group. In that way, the longer-term group direction and sense of priorities comes from the farmers.

The most effective and willing champions will typically be involved in other community activities such as service clubs, churches or agricultural organizations.

3. Clear focus, goals and objectives

The definition of the group's **direction and purpose has to come from the members** and the goals and objectives have to be clear. Over time, goals and objectives may change, but only after a sound debate and with the consent of members.

4. Clear rules of governance

The group needs to have clear rules on how it functions, as producers want to know what they are getting into when they join. However, the exact **nature of the rules can vary** significantly from one group to another, adapted to the specific situation.

5. Membership and recruitment

All members must have a form of **“buy-in”** and some form of membership fee or cost sharing is often part of that. Members who have little interest in the group or who lose interest should not be “arm twisted” to join or to stay. There are many ways to foster interest, but it seems the best recruitment tactic is still word of mouth. Group members must see personal value for their investment in time or money. While many groups are built upon existing relationships, there are benefits to groups with diverse membership that generate a greater variety of ideas and view points.

6. Trust comes from face-to-face encounters

Even in this new virtual age, **trust means getting to know each other** and this is best achieved by face-to-face, local encounters. Successful groups organize meetings and sometimes field trips or farm visits. There may be groups where the members are not from the same geographic area, but fully virtual farmer-led groups or groups are still rare. Involving farm family members in social activities, especially spouses, often helps build the trust relationship.

7. Confidentiality

This is a key element for benchmarking activities and group analysis. Farmers want to know that the data they provide remains confidential. Successful groups are those that have provided the **necessary safeguards** and clear rules around this.

8. Timely Meetings

Particularly in the agricultural sector, meetings must be planned according to time of day and time of year that is most **suitable for a majority of members**. Meetings should not be too long so that people don't feel like they are repeating themselves or wasting valuable time. Meetings have to be **regular enough to maintain the momentum**.

9. Funding, Finances

Even if it's only coffee and doughnuts, every meeting has some **costs** associated with it. Think about who will pay for what, for example rotate the hosting function, have a petty cash, etc. As the group develops, takes on projects or needs paid support, it will eventually need a financial plan.

10. Support, expertise or facilitation

Producers can find the time to attend meetings, but they find it harder to take the time to organize them, to dig up information, or to find an expert to help with a technical problem. A **support person** can maximize the producers' time by doing some or all of the following:

- take care of logistics (arranging meetings, field trips, documentation, etc.);
- search for information to meet group needs;
- analyse reports or data;
- network with other relevant stakeholders.

Such support can come from various sources, such as:

- consultants or contracted staff paid by the group;
- government employees;
- college or university staff.

The most successful and long lasting groups usually have access to part-time or full-time support from professionals that have technical expertise and contacts in the area that is of interest to the group, and who have facilitation type skills. Groups that have access to external supports are better able to maintain momentum and find a new leader from within the group when the founding leader moves on.

In some cases, usually where the group is more focused on technology transfer and best practices than financial benchmarking and management, an experienced group member who can afford the time can play the support role.

It is also true that many groups begin without external supports. As the group grows in size or when the need for expertise they don't have arises, and as the value of the group and their trust level grows, they will find a way to access any external supports they need.

This is the end of **PART A**, the First Steps in Starting a Farmer-Led Group.

Topics covered include:

- ✓ How to unlock the power of groups: reasons why so many farmers work in small peer groups to improve management
- ✓ How the spark to start a group commonly happens
- ✓ Thinking about the purpose of the group and how it will function
- ✓ Ideas on how to recruit other producers to join a group
- ✓ Ten tips for success based on the experience of farmers who have done it

Ready... Set... Go... If this is all the time you have to read right now, and you want to get moving, you can put this booklet aside and start contacting others about forming a group. But remember where you put the booklet, because you should read Part B before you organize the first meeting!

PART B

Farmer-Led Groups in Action

James and Joan McKinlay are beef cattle producers near Ravenna, Ontario. They are both very involved in a number of industry organizations and believe this has added significantly to their business and knowledge. “Networking allows us to interact and gather information so we are aware of what is going on in our industry”, explains Joan. “It also provides mental stimulation and personal development and can also be another avenue to promote our cattle.”

“Best Practices of Leading Farmers, Phase II”
Saskatchewan Agrivision Corporation, August 2006

First Meetings³

When starting a new group, it's especially important to hold interesting first meetings. Time spent on preparations is an excellent investment.

Setting an agenda

- **Drafting an agenda** will help focus your thoughts. What are you trying to accomplish at the meeting? What outcomes would represent success?
- Organize your thoughts and make a **few notes**.
- **Talk individually** with at least a few key producers about the purposes for the group and ask for their input on how to organize the meetings.
- Try to reach everyone on the invitation list, and get their **commitment** to attend.
- Keep some notes about these initial conversations and share them at the next meeting, asking for comment on them, as a way of being sure the **group is in agreement**.
- Make a **record** of names and contact information for the individuals interested in participating in the discussion group.

*To ensure group agreement...
Keep notes about what was decided and share them, asking for comments.*

Examples of topics for first meetings

- **Introductions** of everyone.
- **Background** on why/how the group got started. Ask people why they were interested and came to the meeting, or what their needs are.
- Identify people's **expectations** of the meeting and of the group.
- Explore the **important issues**, which the group might like to focus on.
- Introduce the idea of **skill development** and how the group might contribute to each member's skills.
- General discussion on how the group might **function/operate**.
- Discuss **interesting topics**, consider a farm visit or speakers for next meetings.
- **Next meeting** – date, place, possible agenda.

Two things that are not usually on the formal agenda can make or break a meeting: time for informal discussions and logistics. Allow time for **informal discussions** before the meeting starts and during a break. Snacks and drinks encourage people to relax and socialize, which is often the glue that holds a group together. **Logistics**, if they are not organized adequately, can often be the undoing of a meeting. A room that is too small, difficult access, photocopies, etc. are all important factors. Please see Appendix IV, for a "Logistics Checklist".

³ Adapted from *Education and Training for Primary Producers – a Guidebook for creating rural learning networks*, prepared for the Australian Department of Agriculture, Fisheries and Forestry, Ian Colley, Bruce Thomson and Monica Redden Skill Strategies, available at http://www.daff.gov.au/__data/assets/pdf_file/0003/194322/the-guidebook2.pdf

Suggestions for effective meetings

1. Clarify the Meeting Objective

The group begins the meeting by ensuring that people understand and agree on what is to be accomplished. Objectives include both the content of the meeting and the specific process objectives, such as improving participation, gathering initial ideas and listening to others.

REMEMBER
Each participant should be considered an expert and should be asked to speak to share their experience.

2. Review Roles of Participants

Confirm who will be taking on specific roles for the meeting and what their roles will be. These can include leader, team members, recorder, timekeeper, and facilitator.

3. Review the Agenda

Each agenda item includes the methods (e.g. brainstorming) to be used for that item as well as the approximate amount of time to be devoted to each.

If things get difficult, call a break, during the break consult informally with those who seem most concerned, to better understand their points of view.

4. Work through Agenda Items

There may be one or several items for a particular meeting. The group works through them in an organized manner, using the methods and the time frame decided upon in step 3 above.

5. Review the Meeting Record

Members should review information recorded on flipcharts during the meeting to refresh their memories about what has occurred in previous meetings along with what has been decided. The group should check for corrections or additions to these meeting records and decide what information needs to be kept in the group's permanent transcript. These are sometimes included in formal knowledge management databases and archives.

6. Next Steps and Next Meeting Agenda.

By the end of the meeting, the group should discuss what needs to be done based on the results of this meeting. Often, there are multiple steps and tasks needing follow-up or planning. Agree on the work that needs to be done next in order to advance. Clarify if necessary and complete the transcription of the goals, summarizing commitments.

*For each agenda item, first define, then discuss:
CONTENT: what is discussed (topic or problem)
PROCESS: how the topic is discussed (i.e. brainstorming, go-around, presentation)
RESOLUTION: is a decision needed or are we just discussing? If a decision is necessary, define how the decision will be made (consensus, voting)*

7. Evaluate the Meeting

Members should take a few minutes to discuss what went well that should continue and how to improve the next meeting.

Keeping the meeting on track

The chair or facilitator of the meeting will do everyone a favour by keeping the meeting on track. This starts with good preparation and includes the use of appropriate **process intervention**. Process intervention is an interruption by the facilitator/leader of the meeting, in order to refocus participants and/or to rebalance group interactions.

When the group agrees on the agenda and length of the meeting at the outset, they are in fact giving the team leader permission to help them stay focussed and have a **productive meeting**. So the person leading the meeting can refer back to that, or to the ground rules or group norms.

As facilitator/leader, your goal is to support the participants in achieving their desired outcomes by staying on track and **balancing participation with results**, so interventions must be supportive. The key is to speak clearly, using assertive language, with supportive tone of voice and body language.

The six most common situations requiring interventions to keep the meeting on track are:

- Some people talk too much, others too little
- Side-bar conversations
- Staying on time
- Never-ending discussion
- Conflict (personal attacks)
- Returning from breaks

Failing to deal with these situations can lead to members losing focus, motivation or simply being “turned off” by the exchanges that take place.

On the other hand, it’s their meeting, so if a majority of the group members want to change the agenda or take an unscheduled break, the facilitator/leader should support this being done in an orderly manner.

The following appendices may help in leading a group: Appendix V “Giving and Receiving Feedback”; Appendix VI “Sources of Conflicts”; Appendix VII “Conflict Resolution Worksheet”; and Appendix VIII “Dealing with Specific Personalities”.

Seeing “eye to eye”

Setting a common vision

The first few meetings serve to establish a **common vision** for the group, its main purpose for existing. Goals and objectives will flow from this broad vision. A written charter will help new members understand the focus of the group, and reviewing it from time to time is a good exercise for all members.

Setting common goals

After identifying a common purpose, or a broad vision of what your group wants to achieve, you are able to set goals, which are steps taken toward carrying out your group’s vision. In setting goals, it is useful to rely on the characteristics of “SMART” goals, as outlined below.

Adequate goal setting will create a basis on which you can rely to monitor/evaluate your group’s progress toward its vision.

S

Specific: Set a concrete goal that addresses results.

M

Measurable: State the goal in a way that you can easily measure progress.

A

Agreed upon: Don’t do it alone, ask others to help and support you.

R

Realistic: Members will adhere to goals that they believe to be achievable.

T

Timely: It is important to add a timeline by which the goal will be achieved.

Setting ground rules

Right from the first meeting, ground rules help participants establish appropriate ways to interact with each other during the meeting. If participants have never met or only met occasionally, they may not have developed ground rules.

Typical ground rules are:

- Attend all meetings and be on time
- Listen to and show respect for the opinions of others
- Follow the agenda - stay on track
- Encourage participation- the only stupid question is the one that isn’t asked
- Ensure that credit is given to those to whom it is due
- No disruptive side conversations
- Cell phones and pagers off

Develop a formal organizational structure when you are ready

A **formal structure** may increase your group’s credibility in the community, or may be required to give it legal authority and fiscal status to conduct certain activities. But if the nature of your group does not require that type of structure, don’t feel you have to formalize it.

Sustaining a farmer-led group

Once a group is created and activities are underway, one of the challenges is to sustain the group. There may be times where members seem to lose interest and/or focus. **Momentum** is the force gained by the development of events. This force will eventually help propel your group forward. Building and keeping momentum is necessary to keep your members engaged and energized throughout the process.

Keeping the momentum⁴

Preserve energy and enthusiasm

A challenge to keeping the momentum of your group healthy and strong is **fatigue**. Member exhaustion and burn out is common. Your group's capacity to be **flexible** and respond effectively to transitions can help minimize the fatigue of members. Some members may have made several past attempts to create change in their conditions with varying degrees of success. Because of barriers that may have been encountered during these attempts, these individuals may feel that their energy and efforts were in vain, creating a sense of "fatigue".

Remember to celebrate your group's accomplishments and to honour the contributions of each member.

Some helpful hints to maintain your energy and enthusiasm:

- Continue to **encourage participation** by all members and ensure their perceived **ownership** of group activities.
- Before starting to assign tasks, ask **each member what he/she is ready to do**, or not ready to do.
- Check in to make sure that each member has taken **realistic roles and responsibilities** so that no individual feels overburdened.
- **Develop easily completed, short-term goals** that can be expected to produce "small wins" that will keep members motivated and optimistic.
- Anticipate and plan for **training and resources** needed in your group.
- Create **local awareness** of and support for the group.
- Ensure that **all members** are participating in group activities.
- Encourage **shared leadership and decision-making**.
- Develop a strong sense of **group identity**.

Honour your group

Part of honouring your group is to **understand its needs**. At some point, members may decide to formalize the group and may seek advice to determine the most appropriate structure. This may also lead you and your members to consider contracting management or administrative staff. Another way to honour the group is to have a social occasion from time to time at which you **celebrate your work** together without a business agenda.

⁴ Adapted from "Momentum" and "Maintaining Partnerships", Missouri Information for Community Assessment, Missouri Department of Health and Senior Services, at <http://www.dhss.mo.gov/InterventionMICA/Topics.html>

Adapt to change

Your group should consider **strategic flexibility** as one of the most important characteristics of its process. A willingness to adapt to change (e.g., to abandon strategies that don't work and to try new strategies that are unconventional) will help your group to sustain its work over time and ultimately accomplish its goals.

To maintain momentum, your group will need to be **responsive to changes** in agricultural conditions and to changes in the needs of members. This responsiveness may involve changes in the arrangement and focus of the group. Keep in mind that making these changes may be challenging. Long-time members may feel as if their concerns are being minimized as the group incorporates new perspectives. To keep from losing valuable members during periods of transition, try these approaches:

- Make special efforts to convince members of both the importance of modifying the group's focus and their **continued value** to the group rather than allow them to feel as if they are being replaced.
- **Create subcommittees** through which some members of your group can engage in new ventures while others continue to carry out on-going activities.
- **Focus on building and maintaining relationships** during group meetings. This is particularly important as new members join the group.

There may be a point in time where momentum decreases so much that the fire goes out. It may be that group has met the original needs of its members. Then, it is perfectly acceptable consider letting go. If so, why not celebrate its success with a goodbye party?

Organizing activities

Group members will be much more interested in participating in a group that joins in **diverse activities**. Members need to be consulted about what type of activities they would like to organize, their frequency and also about what they can contribute as a group member towards the organization of such activities.

Some examples of farmer-led group activities

- Discussions may be sparked by **guest speakers** with specific expertise or experience, **watching a video**, working on a **case study** or posing a question or problem and brainstorming possible answers or solutions.
- **Farm tours**. Including tours of group member farms to help them with specific questions or challenges, or tours of farms or agribusinesses outside the group's home area.
- **Production record review and critique**. This can focus either on the broad production records of one member farm or a specific production area across all member farms.
- **Financial record review and critique**. This can be done on an individual farm within the context of a farm question or challenge like remodelling, expansion, or a major purchase, or a general financial management discussion across all member farms. Case studies can be used to ease concerns over sharing specific financial data.
- **Farm problem-solving**. The group can focus on a single group member's farm where there is a particular problem the member wants help solving.
- **Whole-farm analysis**. The group comes onto a group member's farm to analyze the entire operation and suggest where improvements might be made.
- **Farm planning advice**. The group can come onto a farm, group member or not, where the owners are considering a major expansion or other major change and provide the group's collective wisdom as to how they might proceed.
- **On-farm demonstrations**. Demonstrations provide the opportunity to implement and evaluate new practices or technologies in specific farm situations. A group may wish to sponsor such demonstrations or simply visit demonstration projects. While demonstrations lack the rigor of research, they can still provide valuable experience and anecdotal information.
- **Field research trials**. Compared to demonstrations, on-farm research trials on group member farms allow farmers to put more confidence in the results. They also build closer working relationships between farmers and researchers and allow researchers to learn from the practical experience and knowledge of the farmers.
- **Field days on innovative topics**. When you hear about a fellow farmer using innovative technology or practices, contact him and organize a group visit so your members can benefit and possibly reproduce these new approaches.

Monitoring and evaluation – An ongoing process

The key word for monitoring and evaluation is “ongoing”. Indeed, the process of looking back to better move forward is essential for a group to keep on track, adjusting its operations as the need arises. Monitoring and evaluation will ensure that you are moving toward your goals and that your activities are supporting the achievement of these goals.

Simple ways to monitor progress:

- After each meeting, activity or event, have a discussion to look at what went well and not so well, why and why not.
- Periodically review your group’s charter or mission statement, so you can assess whether you need adjustments in order to fulfil your vision.
- Hold biannual sessions with your core group to assess where the group is at, where it should/could be.
- Celebrate your victories! They go a long way toward farmers’ continued investment in time and efforts.

Monitoring and evaluation will ensure that you are moving toward your goals and that your activities are supporting the achievement of these goals.

- Use simple evaluation tools to measure the success of a meeting, activity or training session. For instance, you might ask participants:
 - What did you like most about the activity? Why?
 - What did you like less about the activity? Why?
 - What improvements would you suggest?

Then again, after a year or so of group meetings, you may choose to assess its general efficiency and its ability to move toward the common goals you had set. You might want to ask questions pertaining to:⁵

- **Relevance** – Was/Is the group still a good idea given the current situation?
- **Effectiveness** – Have the planned purpose, goals and activities been achieved? Why or why not?
- **Efficiency** – Were resources and time used in the best possible way to achieve outcomes? Why or why not?
- **Impact** – To what extent has the group contributed towards its longer-term goals? What unanticipated positive or negative consequences did the group have?
- **Sustainability** – Will there be continued positive impacts as a result of the group? Why or why not?

Look out for the unintended positive and negative impacts in order to take any corrective action that might be necessary.

⁵ Adapted from *A Guide for Project M & E*, International Fund for Rural Development, <http://www.ifad.org/evaluation/guide/index.htm>

This is the end of **PART B**, Farmer-Led Groups in Action.

Topics covered include:

- √ First Meetings: agenda, effectiveness
- √ Keeping meetings on track
- √ Setting out a vision
- √ Establishing ground rules
- √ Sustaining a Group, maintaining momentum
- √ Organizing activities that will renew the group
- √ Monitoring and evaluation

For Additional Information

The Appendices contain a description of the most common types of farmer-led small management groups, worksheets to help you check your readiness to start a group, and problem-solving suggestions.

Note that the Agricultural Management Institute (AMI) has a full-length companion document called "Farmer Working in Small Groups- A Resource Guide". It describes how the need for this type of guide was identified by agricultural producers and the process for garnering the advice and wisdom of experienced groups. It contains additional details on the topics covered in this Booklet, as well as examples of small farmer-led groups from different parts of Canada and internationally, facts and figures, websites and other resources. It is recommended reading for group leaders, facilitators or advisors.

APPENDICES

Information, Checklists and Worksheets

Clare Schlegel is highly regarded by many as an innovative producer. For 27 years, he and his wife Catherine have operated their mixed farm near Tavistock, Ontario. It's evident that Schlegel believes in aligning with like-minded people to achieve synergies. In their crop business, he's farmed together with a neighbour for over 20 years. Their neighbour has the planting and harvesting equipment while the Schlegels have the trucks and grain handling facilities. Another key factor in their success is Schlegel's involvement in commodity groups.

"Best Practices of Leading Farmers, Phase II"
Saskatchewan Agrivision Corporation, August 2006

APPENDIX I – DIFFERENT GROUPS FOR DIFFERENT NEEDS⁶

The Technical Support Group

Description

This type of group usually operates informally. It is composed of producers working in the same production area. It organizes social activities, invites speakers and focuses on discussions regarding production techniques. This group does not deal with the sharing of economic information.

Objectives

- Enable producers to acquire information on new production techniques.
- Facilitate discussions between producers regarding production techniques.

Advantages

Producers belonging to a technical support group have the opportunity of being part of a structure that stimulates them to be more efficient while offering them a group setting to do so. In the long term, members of this group would realize further gains by taking an interest in the economic and financial issues that affect producers.

The Marketing Group

Description

Members of this group are usually more active in agricultural marketing. This type of group is similar to the technical support group; however, it begins to explore the economic issues that affect production. Group members may even pool their resources to buy or sell common products. The marketing group can be used as excellent introduction to the benchmarking group or management group. A critical mass of producers will have already been reached and the habit of pooling information will have been learned and accepted.

Objectives

To enable the producers to become familiar with:

- futures and options markets;
- the different types of delivery contracts;
- the basic principles governing market developments

Advantages

The marketing group can make better use of the producer's common interests by taking an additional step and promoting the sharing of cost of production information. The advantages associated with participating in this group lie in the improvement of market intelligence. Even though the information that leads to this knowledge is available elsewhere, the group's advantage is that it initiates discussions, regionalizes information, and allows for group discounts in the purchase of inputs. Economies of scale also exist in terms of the cost of acquiring the information. Another significant advantage can be found in the creation of networks with other producers and different professionals who interact with the group. A Marketing Group may evolve into a Cooperative or other joint business venture.

⁶ Adapted from "Farm Management Clubs; A Roadmap", Canadian Farm Business Management Council, 2000, CFBMC Index: 0300-4 ISBN: 1-894148-53-3.

The Benchmarking Group

Description

The term “benchmarking” means setting points of reference. The benchmarking group focuses on the common interest of comparing information. Not only does the group use data collected by government sponsors or private accounting firms in order to analyze the structure of its members’ production costs, but in addition, the producers share with each other, information concerning their own operating performance. This group is usually very structured.

In many cases, benchmarking groups need to devote a great deal of energy to standardizing members’ data. The desire to push management experience a little further can stimulate the members of a benchmarking group to move to the next stage – the creation of a management group.

Objectives

- Examine the production costs by comparing expense items with producers working in similar conditions;
- Use technical and economic criteria in comparing the efficiency of producers working in similar conditions
- Help the producers identify their strengths and weaknesses in managing their businesses.

Advantages

Producers can hold detailed discussions and acquire detailed information from other producers in relation to costs of production and technical and economic efficiencies. The management group parallels the benchmarking group to a great extent. The management group goes further by hiring outside resources/advisors to ensure the standardization of accounting data.

The Management Group

A management group collects, compiles and analyzes the data on the financial performance of the members’ businesses. Furthermore, it assists the producers in strategic management. Several services may be offered by the advisors, such as:

- accounting practices and implementation;
- group analysis;
- advice on agricultural investments;
- advice on project funding.

Objectives

General:

Increase members’ technical, economic and financial management ability and access to information.

Advantages

The management group promotes the sharing of information in a small group of producers. It has been clearly demonstrated in Quebec that producers belonging to management groups have obtained greater benefits than non-member producers.

The Multi-Service Group

Description

In a multi-service group, the accounting and management sectors assume a significant portion of the energies. Results analyzed by management advisors are used as a basis for directing other services. The management advisors play a pivotal role in the organization. Advisors coordinate activities in the various production areas and other lines of action. The other lines of action can include items such as: taxation, the environment, crop and livestock management, rural engineering, agricultural law and certain veterinary services.

Objectives

The general mission of multi-service groups is:

- to define the production and management techniques and methods most appropriate for producers;
- to formulate recommendations on problems concerning production and business management;
- to perform technical and economic analysis;
- to record and process the technical and economic data in order to provide useful information to producers;
- to organize professional development activities;
- to bridge the gap between the field and research.

Advantages

Multi-service groups have the advantage of offering one-stop services to producers. Producers can find professionals capable of answering all their questions at a single location close to home.

The Co-operative⁷

A co-operative, or coop, first and foremost is an organization based on the value of membership. It exists to provide a service or meet the needs of its members, operating with a cautious financial margin to maintain organizational sustainability. It is a democratic model in which each member has one vote. It is incorporated and has by-laws. If any of the types of groups described in this document find it is appropriate to incorporate, the co-operative model is very similar in outlook to many self-help and sharing groups, and is therefore a common model. But there are others. Non-profit incorporation can be very similar in function, but it allows for non-voting categories of membership and its goals are usually described in philanthropic terms. A business corporation may be more appropriate where the group exists primarily to generate a profit. That model is based on shareholder control, meaning that different farms could own differing numbers of shares.

Objectives

General:

Provide services to members.

Specific:

Cooperatives may provide virtually any service.

Advantages

There is a very large and well-established co-operative movement, which means many opportunities for advice on getting started, as well as ongoing networking and training. Various governments and foundations offer funding to qualifying co-ops.

⁷ Excerpted and adapted from documents found at : <http://www.ontario.coop/>

The Innovation Group⁸

Description

The Innovation Group is set up to bring together people who aim to expand their knowledge-base, through research and development in commercial and scientific areas. The ultimate goal is that innovation transforms this new knowledge into benefits, involving the processes by which ideas for new or improved products, processes, or services are developed and commercialized in the marketplace. Innovation usually leads to change in the way things are done or a product that is diffused in the marketplace.

Objectives

Innovation groups aim to achieve some of the following objectives:

- identify innovative ideas that can be commercially developed or have a socio-economic value on the farm;
- use information and research to develop strategies and action plans to better position themselves with regard to major initiatives in science, innovation and development;
- draw on existing or develop new, agriculturally-related value chains;
- identify new science-based innovations through transformational/proving techniques and processes.

Advantages

New discoveries and their application are crucial to ensuring Canadian farmers benefit from their ability to produce food and an ever-increasing range of non-food products from the land. Examples of these new applications include bio-materials, bio-medical and bio-health products, bio-fuels, bio-energy, bio-chemicals and bio-pharmaceuticals. Participation in an Innovation Group is a means by which forward-thinking producers enhance their results and profits.

⁸ From websites: Agri-Innovation Program, Agriculture and Agri-Food Canada, at www4.agr.gc.ca/AAFC-AAC/, the Potato Innovation Network 2020, at <http://www.pin2020.ca/>, Agriculture and Agri-Food Canada Science Innovation Strategy, Science Policy and Planning, Science Bureau, AAFC, 2006, www4.agr.gc.ca/resources/prod/doc/sci/cons/strat/pdf/Science&InnovationStrategy-e.pdf.

APPENDIX II – READINESS FACTORS⁹

ISSUE	DESCRIPTION
WHAT ARE THE GROUP'S PURPOSES?	What's the issue? How do you think a group could help? Try to find at least one other person who shares your interest and talk it over with them.
WHO SHOULD BE IN THE GROUP, AND WHY?	Groups develop a culture and direction based on the needs and desires of like-minded participants. For this reason, it is important that group members have some needs and desires in common. On the other hand, there is merit in having members from different age groups and women as well as men; a variety of life experience is a definite asset. Participants will remain in a group long-term only if their involvement meets their needs and expectations.
HOW WILL POTENTIAL GROUP MEMBERS BE CONTACTED?	Will you use targeted informational mailings, mass media, individual contacts, a calling tree, or some other method of getting the word out? Perhaps more than one method will be used. Which method is likely to generate the most effective results?
WILL GROUP MEMBERSHIP BE OPEN OR CLOSED?	In an open membership format, new members can attend meetings at any time and participate fully in group activities. The advantage is that the group might grow quickly, and as new members join, they bring fresh ideas and new perspectives that enrich discussions. On the other hand, open groups may require more formal structure and more facilitation skills, because a shifting membership will change group dynamics, and you are always bringing new members up to speed.
HOW MUCH STRUCTURE AND FORMALITY DOES THE GROUP NEED?	Smaller groups generally need little structure and can function with informal leadership. Common social rules allow these groups to operate smoothly and discuss topics conversationally. The larger the group gets, the more it will benefit from increasing levels of formality and structure. Will the group function as a collective, will it need a president and an executive, or something in between?
HOW WILL THE GROUP MAKE DECISIONS?	Will votes be taken and the majority rules? Or will the group discuss until a consensus emerges? Does the person who calls the first meeting automatically become the leader, or will there be a process to choose a leader after a few meetings?
WHO WILL PROVIDE SUPPORT FUNCTIONS FOR THE GROUP?	Regardless of how small the group is, someone has to find a meeting place, contact the others (and send a reminder!), write an agenda, prepare refreshments, and so on. Sources of advice are local representatives of Departments of Agriculture, Colleges or Universities, and farm organizations. The group can also benefit from cooperation with local community agencies and associations.
WHERE SHOULD MEETINGS BE HELD?	Some groups meet at member farms; this is especially useful if the discussion involves the farm since there is easier access to records or to tour the facility. Other groups prefer a central meeting place like the community centre or a church hall. Most important is that there be a meeting space that is comfortable.
HOW WILL THE COSTS BE MET?	There is always some cost to running a group. Even if you use faxes and e-mail instead of stamps, you probably want to have coffee and make photocopies. What costs are the group likely to incur, and how will you meet those costs? Will you have a petty cash or open a bank account? Who takes charge of the money? How are the costs shared, by donation or set fee? If you mount a project that seeks government funding, that will require formal accountability mechanism and a bank account.

⁹ Adapted from Missouri Department of Health and Senior Services, <http://www.dhss.missouri.gov/InterventionMICA/AssessingYourReadinessWorksheet.pdf>

APPENDIX III – READINESS WORKSHEET

ISSUE	YOUR ANSWER
WHAT ARE THE GROUP'S PURPOSES?	
WHO SHOULD BE IN THE GROUP, AND WHY?	
HOW WILL POTENTIAL GROUP MEMBERS BE CONTACTED?	
WILL GROUP MEMBERSHIP BE OPEN OR CLOSED?	

Readiness Worksheet (continued)

ISSUE	YOUR ANSWER
<p>HOW MUCH STRUCTURE AND FORMALITY DOES THE GROUP NEED?</p>	
<p>HOW WILL THE GROUP MAKE DECISIONS?</p>	
<p>WHO WILL PROVIDE SUPPORT FUNCTIONS FOR THE GROUP?</p>	
<p>WHERE SHOULD MEETINGS BE HELD?</p>	
<p>HOW WILL THE COSTS BE MET?</p>	

APPENDIX IV – LOGISTICS CHECKLIST

Organizing a meeting – Logistics Checklist		
BEFORE		
Main Issues	Factors to consider...	√
Setting the date	<ul style="list-style-type: none"> • Availability of participants • Season/Weather • Statutory Holidays • Workload 	
Choosing an appropriate site	<ul style="list-style-type: none"> • Travelling distances • Budget • Availability 	
Participants	<ul style="list-style-type: none"> • Selection process • Recruitment • Mechanisms for invitations (telephone, emails, etc.) 	
Facilitator	<ul style="list-style-type: none"> • Volunteer? • Rotate this role? • Hiring? 	
Materials and equipment	<ul style="list-style-type: none"> • Photocopies • Audio-visual aids • Flip Charts, markers, etc. • Other 	
Refreshments	<ul style="list-style-type: none"> • Drinks • Snacks 	
ON SITE		
Main Issues	Factors to consider...	
Registration	<ul style="list-style-type: none"> • Distribution of materials • Sign-in Sheet • Name tags? 	
Signage	<ul style="list-style-type: none"> • Posting signs • Clear instructions 	
Setting up room	<ul style="list-style-type: none"> • Chairs & Tables • Flip charts • Equipment • Refreshments 	
Checking, re-checking...	Everything!	

APPENDIX V – GIVING AND RECEIVING FEEDBACK

ACTIONS	DESCRIPTION
Talk in the first person.	Statements such as "I felt..." or "Your idea about..." communicate personal responsibility for responses. They do not claim to speak for others.
Be specific.	Statements such as "When you said this, I..." or "Your idea about..." focus on the particular action or statement. Avoid general comments such as "You keep..." or "You always...".
Challenge the idea or action, not the person.	Focus on actions or behaviours, that a person can modify (not their personality).
Combine recognition of what worked with a challenge to improve.	Again, be as specific as possible. For example, if a person sounds preachy in a part of the presentation but engages people in a lively way in another part, refer to the positive side as a specific model of tone, strategy, and style to be emulated.
Ask questions to clarify or probe reasons.	Questions such as "What did you take into account when you decided...?" or "What did you mean when you said...?" credit the person with selection and judgment. The questions also help avoid criticisms and suggestions that are irrelevant to what the person is trying to do.
Identify the bridges.	When you are giving critical feedback to a member, remind her or him of what you have in common. Comments such as "I know that when we do X we tend to...", remind the person that you're on the same side. Sometimes a part of this same bridge may be to acknowledge differences. For example, "I haven't had the same experience as you, but...".
Acknowledge how you connect to a problem.	Because people can learn as much from what goes badly as from what goes well, it helps to show how you have also experienced a similar problem. Statements such as "I've had this problem, myself, too..." or "This is helpful for me/us to think about because..." emphasize that this is not just an academic exercise for you as facilitator.

APPENDIX VI – SOURCES OF CONFLICTS¹⁰

There are five main sources of conflict between two parties. They are values, resources, interpersonal relationships, interests and facts. Knowing these root causes may help to determine what's needed by either or both of the parties to resolve the situation.

Root Problem

Values (often the most difficult to resolve, due to the deep-rooted nature of the situation)

Possible Causes

- assumptions about the other person's values
- real differences in values
- not checking assumptions about values
- mistaking behaviour for values
- seeing a difference between the person's behaviour and what they say are their values
- values are not disclosed
- different ways of life, ideology and/or religion

Root Problem

Resources

Possible Causes

- two or more entities competing for what are assumed to be limited resources
- perception of unequal control, ownership or distribution of resources
- geographic, physical or environmental factors hindering co-operation
- time constraints

Root Problem

Interpersonal relationships

Possible Causes

- general lack of familiarity with others
- stereotypes
- failure to check assumptions about one another
- behaviours perceived to be negative
- unresolved disagreements
- unstated interests
- past negative encounters with the other party

¹⁰ Adapted from "Resolving Conflicts", Fact Sheet # 880, Chuck Bokor, Community Leadership Specialist/OMAFRA; Revised by Luna Ramkhalawansingh, Community Economic Development Unit/OMAFRA, at www.omafra.gov.on.ca/english/rural/facts/06-067.htm#personalities

Root Problem

Interests

Possible Causes

- competing needs, desires or wishes
- substantive, procedural or psychological interests perceived to be in competition

Root Problem

Facts

Possible Causes

- lack of information
- misinformation
- different views on what is relevant
- interpretation of differences
- different assessment procedures

APPENDIX VII – CONFLICT RESOLUTION WORKSHEET

Think of a difficult situation in this group or another where you have been involved and wanted to have resolved more positively. Write down your observations and understanding of the situation:

The problem (2 to 3 sentences)

Who was involved? Who are the main parties?

What actually happened?

What did you want to happen?

APPENDIX VIII – DEALING WITH SPECIFIC PERSONALITIES¹¹

The following strategies could help when you are facing particular personalities that may hinder a group's progress or sometimes throw the group leader and members "off balance".

Complainers

Gripe incessantly but never try to do anything about their complaints. May feel powerless to do anything or may refuse to bear the responsibility for a solution.

Strategies

- Listen attentively even though it may be very difficult.
- Acknowledge what the complainer says by paraphrasing the complaints. Don't agree with the complaints.
- Be prepared to interrupt and take control of the situation. Complainers love to ramble.
- Use limiting responses that pin the complainer to specifics.
- Avoid the accusation-defense-reaccusation sequence where you defend an accusation and then are reaccused.
- State the facts without comment and without apology.
- Switch to problem solving.

Indecisives

Can ruin a program because they put off decisions until it is too late to do anything about it. Delay making a decision until the decision is made for them. Won't let go of anything until it is perfect, which it never is.

Strategies

- Bring the issues out in the open and make it easy for them to be direct. Pursue all signs of indecision.
- Help them solve the problem(s).
- Place all the alternatives in rank of importance.
- Emphasize the importance of quality and service.
- If possible, keep control of what you are working on.
- Watch for signs that the pressure to make a decision may be overloading them.

¹¹ Adapted from "Resolving Conflicts", Fact Sheet # 880, Chuck Bokor, Community Leadership Specialist/OMAFRA; Revised by Luna Ramkhalawansingh, Community Economic Development Unit/OMAFRA, at www.omafra.gov.on.ca/english/rural/facts/06-067.htm#personalities

Super-agreeables

Appear very reasonable, sincere and supportive, at least in your presence. Often don't produce what they say they will produce. Sometimes act contrary to what they have led you to expect.

Strategies

- Make honesty non-threatening. They are afraid you don't want to hear the truth.
- Don't allow them to make unrealistic commitments they can't fulfil.
- Be prepared to compromise so you are both in a win-win situation.
- Listen to their humour. They often hide the truth there.

Negativitists

Object to everything. Believe whatever you propose won't work or is impossible. All too often completely deflate any optimism you might have for a project.

Strategies

- Avoid being drawn into their attitude.
- State your own realistic optimism. Don't agree with them.
- Don't hurry to propose solutions.
- Use their negativism constructively. It never hurts to have a devil's advocate.

Know-it-all Experts

Believe, and want you to believe, that they know all there is to know about anything worth knowing. Are usually imposing, condescending or pompous. Will try to make you feel inferior.

Strategies

- Do your homework on the subject.
- Listen to and acknowledge what they say.
- Question firmly, but don't confront. They hate being wrong.
- Avoid being a counter-expert.
- Let them be the expert they think they are.

Silent-unresponsives

Answer every question and every plea for help with a yes, a no, or a grunt and sometimes with an I-don't-know.

Strategies

- Ask open-ended questions. Use the friendly, silent stare.
- Comment on what is happening in the discussion.
- Recycle the conversation if necessary. Break the tension by helping them to say what they are thinking.

Please note that the Agricultural Management Institute (AMI) has a full-length companion document to this Booklet, called “Farmers Working in Small Groups – A Resource Guide”. It describes how the need for this type of guide was identified by agricultural producers and the process for garnering the advice and wisdom of experienced groups. It contains additional details on the topics covered in this Booklet, as well as examples of small farmer-led groups from different parts of Canada and internationally, facts and figures, websites and other resources. It is recommended reading for group leaders, facilitators or advisors.

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