



DEVELOPING MONTANA'S AGRITOURISM: A RESOURCE MANUAL



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INTRODUCTION

Welcome to AERO's *Developing Montana's Agritourism: A Resource Manual*, developed by AERO staff with the support of the USDA Farmers Market Promotion Program, and the Agritourism Working Group of the Montana Department of Agriculture, Department of Commerce, MSU Extension, Governor's Office of Economic Development, Food and Ag Development Center Network, and the Montana Farmers Union. This manual is a resource for farmers, ranchers and producers specific to the state of Montana, geared towards helping you gain a deeper understanding of agritourism and how it can impact the connections between your community and farm. These resources can serve as a jumping off point to help you support or launch agritourism in your area and enhance the agritourism activities you already offer.

These resources are designed to help farmers and ranchers decide whether or not they want to pursue agritourism as an additional product offering within their current operation. We aim to connect farmers and ranchers with basic information on how to start their own agritourism business through the process of building a business plan, listing important contacts and resources, and inspiring them by sharing existing agritourism successes around the state.

[Important note: Agritourism is young in the state of Montana; practices, policy, definitions, and legal guidelines are in their early stages, and will develop and change as the state explores this unique form of tourism. If you have questions, concerns, comments, success stories or examples, etc., related to the content of this manual, please contact us at aero@aeromt.org. Please also check back periodically for updates as this opportunity develops in our state!]



Left and right images: Touring the Underground, by AERO.

WHAT IS AGRITOURISM?

Montana is in the early stages of establishing a commonly accepted definition for agritourism. However, the definition used in 2017 legislation addressing liability is as follows:

“Agritourism” means a form of commercial enterprise that links agricultural production or agricultural processing with tourism in order to attract visitors to a farm, ranch, or other agricultural business for purposes of entertaining or educating the visitors.

House Bill 342 was passed into law in March 2017, adding agritourism to the list of Montana Recreational Activities in which participants assume the liability for the inherent risks of those activities. For more information on insurance and liability, please see the

Safety and Risk Management section of this resource manual.

At its heart, agritourism connects farms to communities. According to the state of Vermont, ‘it is the business of establishing farms as destinations for education, recreation, and the purchase of farm products. A farm visitor could be from a city far away, or a neighboring town.’ In the Abundant Montana Directory, there are many types of agritourism activities listed including farm and business tours, farm-to-table dinners, farm stays, workshops, internships and volunteer opportunities, and special events such as weddings. For a more detailed description of agritourism activities, please see the *Types of Agritourism* section of this resource manual.



TYPES OF AGRITOURISM

According to the language passed in the 2017 Montana legislature, “Agritourism means a form of commercial enterprise that links agriculture production or agricultural processing with tourism in order to attract visitors to a farm, ranch, or other agricultural business for purposes of entertaining or educating the visitors.” The bill in its entirety can be read at: <http://leg.mt.gov/bills/2017/billpdf/HB0342.pdf>.



Within the scope of that definition, you can group the various agritourism activities into three main groups:

- **Direct-Market.** Roadside produce stands are a great example of direct market agritourism. Farmers sell their products directly to consumers with the added appeal of being on site where the products were grown/made.

- **Education and Experience.** Education and experience agritourism includes pick-your-own apple groves, farm tours, bed-and-breakfasts and packages aimed at giving guests a hands-on education in farm life. The farm itself is marketed as a tourist destination. Whether agritourists pay to pick their own produce, attend wine tastings at a vineyard or participate in workshops/farm camps, the draw is first-hand experience. Farm-to-table dinners have grown tremendously in popularity, connecting visitors through a shared meal in a beautiful setting. Once visitors are acquainted with the farm more closely, they may also be more inclined to buy its agricultural products.

- **Recreation and Event based.** Harvest festivals, corn mazes, haunted hay rides, farm stays, and rural bed and breakfasts fall under recreation and event based agritourism as they rely heavily on the farm’s atmosphere. These recreational opportunities attract a wide range of visitors, some who are looking for an evening event to experience with their family and others who are looking to recreate off the beaten path, making a longer trip out of the experience.

All of the above types of agritourism can help foster meaningful connections between the consumer and the farm. From that, long-term relationships can be forged. This customer loyalty and repeat business is key to the success of many agritourism businesses. Another category of temporary on farm visitors include interns, apprentices, volunteers, and WOOFers (World Wide Opportunities on Organic Farms). These work based educational opportunities allow folks to contribute and learn in a number of areas, while sometimes staying on site for the duration of their experience. Note that our use of the terms “intern”, “apprentice”, “volunteer”, and “WOOFer” do not necessarily correspond with the US Department of Labor’s definitions and each opportunity is specific to the farm that’s listing it. In Montana, the Community Food and Agriculture Coalition has some great resources on the legality of labor laws. For more information, visit their site here: <https://www.farm-linkmontana.org/work-program/info-for-hosts/>



Images - Upper left: A hay-ride at Red Hen Farm in Missoula
Lower right: Farm to Fork Bike tour in the Bitterroot.



IS AGRITOURISM FOR YOU? CONSIDERATIONS BEFORE YOU START

Are you a self starter? Are you willing to give up spare time to lay the foundation and maintain another business? Are you willing to put in extra hours on nights and weekends that your new business may demand? Do you and your family enjoy working with the public? Do you and your family have the personality to work with the public? Are you and your family willing to give up some of your privacy? Is your farm or ranch neat and clean - and will it be difficult to keep it that way?

These are just a few of the questions you need to consider before launching into an agritourism business. There are many steps that should be taken in order to be confident your agritourism business is a good fit for you and your customers. Having patience, being organized, communicating well with others, and adapting to change are all necessary qualities. It is important to think about the goals you are looking to achieve with this venture - Are you interested in making a supplemental income? If so, how much money will you need to support these new activities? If you are not interested in supplemental income, have you calculated the costs involved in launching this venture? Can other parts of your business pay for your new ventures?



Image: Cleaning the grapes after harvest at Spotted Bear Vineyards and Lavender Farm in Polson.

Examples of benefits of agritourism:

- Cash flow during the off season and/or a different revenue stream to augment your business
- Opportunity to sell the “experience” of your agricultural venue
- Opportunity to sell products grown and harvested in your agricultural operation
- Opportunity to share your passion for agriculture with others

Financial benefits – diversified income stream

- a. More income without increasing acreage
- b. Building a new business with existing resources

Meets the need of increasing trend for people to be connected with their food

- a. Education to public
 - i. Where food is grown
 - ii. Farming methods
 - iii. Youth engagement opportunities
 - iv. Marketing opportunities

If you are considering the development of an agritourism enterprise or want to add agritourism as a new enterprise for your farm, the place to start is with an assessment of your abilities and goals. Also consider the strengths and interests of your family members and current business partners. Discuss ideas, consider options that fit your culture and capacities, assess your skills and time realistically, visit other farms, and most of all, develop a plan.

Start by generating a list of all the possible types of agritourism enterprises you want to develop. Write down pros and cons of each including how much work it will take and the costs, both to your business and to your customers. Narrow the list by considering which ideas you or family members/business partners get most excited about and find most achievable. Also, consider what skills and time you and family members/business partners will have to devote to developing the enterprise, both in the short and long term. Think hard about what would work best given the physical resources and location of your farm.

(cont. on next page)



Once the ideas start to solidify, don't assume you and your family are the best judge of what may work or not. Run the ideas past friends and acquaintances, tourism and extension staff, visitors to the area, and business representatives- as many people as you can! Get their honest appraisal of the ideas you have

your family and existing workers, will you have sufficient funds to hire people? Or attract the appropriate kinds of volunteers? Hiring people affects your bottom line, but if it's the difference between offering a good attraction and charging more, choose charging more. Remember, people want the "experience," so it needs to be worth what they are paying for.



Image: The straw bale maze at Whitefish Stage Organic Farm.

selected. Would they visit your farm to participate in activities you are considering? How much would they spend to engage in your agritourism offerings? A key point to remember is that agritourism brings people to your farm, so you must enjoy meeting people and plan activities that visitors will want to participate in, all the while managing the situation to avoid risks.

Anyone beginning an agritourism venture will need the full support of his or her family. The time and energy needed to run an operation will require work and support from the whole family. Most agricultural owners already have employees and/or volunteers/interns/etc., and those people will need to adjust to the changes in operations. For example, when the cows are not being milked, workers can assist with the fieldtrips or plant corn for the corn maze. Lots of multi-tasking and learning of new skills will be necessary, both for you and for everyone who you work with. If you cannot run your new agritourism venture with the help of

When considering agritourism activities for your business, choose something you love to do, What are your talents, skills and interests? Get the whole family involved, provide demand driven experiences, create a high quality product, keep up with changes and trends in the industry, start small and grow naturally, develop a sound business plan (see the business plan resource section) and form partnerships working with neighbors, community members, and regional partners.

Assessing your resources is an important step in the agritourism planning process. You need to collect information regarding land use, land features, land location, soil type, farmstead features, climate, wildlife, new facilities, and opportunities for collaboration.

Are you ready to host?

In addition to the questions and processes described in this manual, check out this self assessment provided by the University of Vermont:

http://www.uvm.edu/tourismresearch/agritourism/saregrant/agritourism_enterprise_self_assessment.pdf



STORIES FROM MONTANA: HOW IT'S ALREADY DONE IN THE BIG SKY STATE

Farm tours – Glenwood Farms, Polson, MT

Farmer(s): Jan and Will Tusick

Agritourism Story: Farm activities include school tours and occasionally they bring sheep into school settings to teach students about shearing. Glenwood Farm is located 5 miles south of the beautiful Flathead Lake. They run 100 head of Coopworth Cross Ewes and direct market their lamb and wool. They have housing for on farm stays and are developing an educational program in lambing, shearing and general sheep management. Will Tusick is their Head Shepherd. Their farm products include: lamb, produce/vegetables, wool/fleece/roving/yarn.

Contact them at:

Email: jt@ronan.net

Phone: 406-883-4093

Facebook: @jantusick

U-pick farms – Red Hen Farm, Missoula, MT

Farmer(s): Greg and Julie Peters

Agritourism Story: Red Hen Farm and Orchard is an organic berry, vegetable and fruit tree farm. They offer both pre-picked and U-pick berries throughout the summer and fall seasons. They also offer tours, educational farm classes and events.



Contact them at:

Email: julieandgreg@redhenfarm.net

Phone: 406-728-8313

Website: <http://www.redhenfarm.net/>

Facebook: @MontanaRedHenFarm



Farm to Table Dinner – B Bar Ranch, Emigrant, MT

Farmer(s): Ellen Webb

Agritourism Story: The B Bar Ranch in Big Timber, Montana started raising Ancient White Park Cattle to preserve the breed. From their start with 15 cows and a bull in 1989, the herd has grown to over 150 females and a full battery of bulls. They also offer certified organic heirloom varieties of produce in addition to certified organic grass-finished organic beef. The guest ranch welcomes commercial groups, non-profit groups, retreats, weddings and family reunions who experience the ranch in a number of ways. On ranch activities include hiking, observation of low-stress live-stock handling, wildlife viewing and tracking, skiing, and snowshoeing.

Contact them at:

Email: bbar@bbar.com

Phone: 406-848-7729

Website: <http://bbar.com/>

Facebook: @b bar ranch

(stories cont. on next page...)



(stories from Montana, cont....)



**Harvest Parties –
Tongue River Winery,
Miles City, MT**

Farmer(s): Bob and
Marilyn Thaden

Agritourism Story: Tongue River Vineyard is approximately 3 acres with grapes, haskaps, cherries, apples, pears, raspberries, plums and more, grown to produce wine. Tongue River Winery has a production area in the garage and basement, with a tasting room on the main floor that seats 45 people, with a scenic overview of the vineyard. The winery provides tastings, and hosts small to medium sized groups upon request. Wine is sold by the glass, bottle or case. Tours of the vineyard and winery are generally available. A nice leg-stretching walk to the Tongue River is available on the site.



**Straw bale maze and hay rides – Whitefish Stage
Organic Farms, Whitefish, MT**

Farmer(s): Megan and Scott Lester

Agritourism Story: Whitefish Stage Organic Farm began in 2016 by Megan and Scott Lester. They grow organic vegetables for the Flathead Valley and offer a CSA share each year. In addition to farm tours and CSAs, each fall the farm offers a straw bale maze made of 3500 bales. Visit the maze and participate in a maze puzzle, pumpkin bowling, hay rides, see farm animals and participate in other family fun activities.

Contact them at:

Email: megan@whitefishstage.farm

Phone: 406-755-4769

Website: <https://www.whitefishstage.farm/about-us/>

Facebook: [@WhitefishStageOrganicFarms](#)

Contact them at:

Email: trwinery@middrivers.com

Phone: 406-853-1028

Website: <http://www.tongueriverwinery.com/>

Facebook: [@TongueRiverWinery](#)



All photos from the Montana Stories section were graciously provided by the farm or organization associated with each photo.



**Educational Programming –
Homestead Organics, Hamilton, MT**

Farmer(s): Laura Garber and Henry Wuenshe

Agritourism Story: Homestead Organics Farm is a small, family run vegetable farm located 3 miles south of Hamilton, MT. They grow a wide variety of vegetables and greens, serving the community through a summer and fall CSA program, an on site Farm Stand, and a variety of youth educational programming. The Youth Roots Project welcomes youth from the Youth Home of the Bitterroot to tend to their own garden located at the farm while working side by side with farmers and interns in the field. Farm Camp takes place each July for children ages 6-12 and the middle school age group called Girls Using Their Strength stays at and participates in the farm during the summer.

Contact them at:

Email: homesteadorganicsmt@gmail.com

Phone: 406-363-6627

Website: <http://www.homegrownmontana.org/homestead.html>

Facebook: @HomesteadOrganicsFarm



Farm Stay– ABC Acres, Hamilton, MT

Farmer(s): James Southwell

Agritourism Story: Agritourism Story: ABC acres focuses on sustainable food production, healthy living systems and regenerative ecological design. Their cattle, chickens, goats, turkeys, and pigs graze on open pasture and their vegetables, herbs, fruits, and nuts are grown with the same approach. This permaculture farmstead in Western Montana’s Bitterroot Valley offers self-guided tours, weekly social events, farm-fresh goods and two first-class, cabin-style homes available for unique farm stays and vacation rentals.



Contact them at:

Email: james@abcacres.com

Phone: 406-210-7688

Website: www.abcacres.com

Facebook: @ABCACres



Fork to Farm tour (cycling adventure to farms and culinary bliss!)

Farmer(s): SweetRoot Farm, Lifeline Dairy, Mill Creek Farm and Willow Creek Vineyard, Bitterroot Valley

Agritourism Story: The Fork to Farm tour is a celebration of the diversity of agriculture and cycling in the Bitterroot Valley. The 40 miles ride includes stops at four Bitterroot Valley farms where riders will enjoy food and drink produced from locally grown vegetables, fruits, and livestock. The ride begins and ends at the Western Agriculture Research Center in Corvallis where riders enjoy live music, a locally sourced dinner, and local cider and beer. Proceeds from the event support Bike Walk Bitterroot’s efforts to make the Bitterroot Valley a safe and accessible place to walk and bike.

Contact them at:

Email: bikewalkbitterroot@gmail.com
Website: www.bikewalkbitterroot.org
Facebook: @bwbitterroot

Cultural Tour and farm stand – King Hutterite Colony, Lewistown, MT

Farmer(s): Rita Hofer

Agritourism Story: The King Hutterite Colony offers a walking tour of the colony, giving visitors an insight into the Hutterite culture and way of life. The tour lasts for about 1.5 hours and shows the communal lifestyle of the Hutterites. Tours cost \$17 for adults and \$10 for children 12 and under. Handcrafted items are for sale at the end of the tour.

Contact them at:

Email: ritahofer2000@hotmail.com
Phone: 406-350-2307





HOW TO MARKET YOUR AGRITOURISM BUSINESS

Marketing Resources

“Marketing is the process of determining what customers want, and of using that information to produce and sell a good or service to satisfy that want” (Southern Maryland Resource Conservation and Development Board). Marketing includes identification of your customer base; a clear description of the goods, services, and experiences offered; and advertising and promotion of your agritourism business.

Create a Marketing Plan

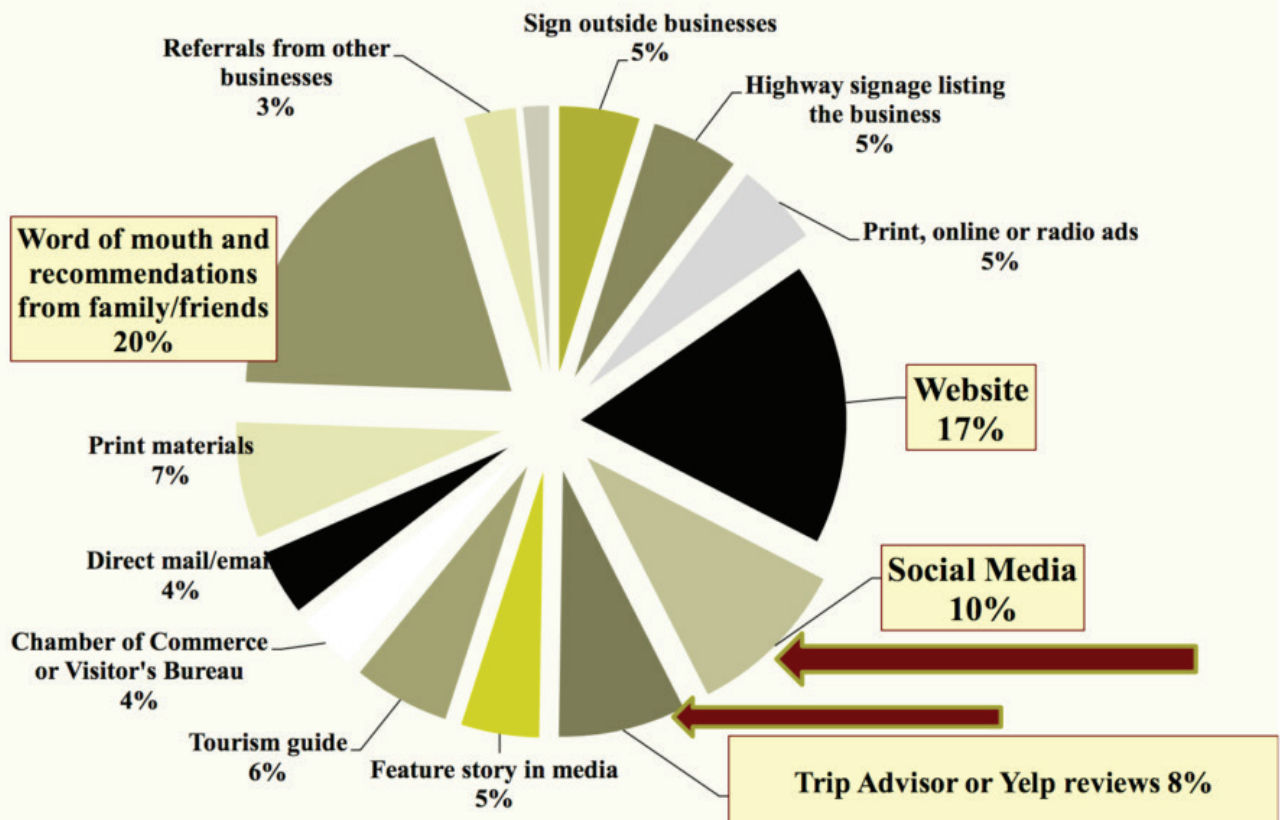
One of the most important aspects of marketing your business venture is the formulation of a marketing

plan. There are many different formats you can utilize to organize your plan, though a strong marketing plan will include the following elements:

- Situational analysis. Take time to dig deeply into your business and the economic, technological, political and legal, and social/cultural trends and issues that currently impact your business. What are your strengths and weaknesses personally and as a business? What opportunities and threats exist that can impact your agritourism activities? Look forward and determine which of these issues are likely to change or stay the same in the coming years. What can you impact? What is beyond your control, and how will you adapt?

(cont on page 12....)

Information Sources Used by Agritourists (from National Survey of Agritourism Visitors)



Graphic courtesy of UC Cooperative Extension Small Farm Program <http://sfp.ucdavis.edu/files/241236.pdf>



(Marketing cont...)

- Who are your customers? Identify customers coming to your area for similar attractions. Such information may be found through agritourism associations, regional tourism councils, or local chamber of commerce and other outlets. Be specific in identifying the group of consumers you wish to target. What goods or services will you be providing, and what specific need do they fill for your customer? You'll want to know things like the demographics, income brackets, and purchasing decisions of each of your target markets. Don't assume that everyone is your customer! Be specific so that you can create products and experiences that your target markets will actively seek out and be willing to pay for.

- Become familiar with your market. What types of agritourism activities are popular or increasing in popularity? Notice where growth is taking place in the industry and the types of activities and goods consumers are seeking. What changes and developments in the agritourism market might be expected in the foreseeable future? Who are your competitors and what can you learn from them? Who are your current and potential collaborators, and how will you work with them?

- Your niche. What makes your agritourism business unique? What would set you apart from competitors? Some examples: a farm/ranch operated by your family for generations with unique heritage components; a unique location with attractive amenities; specialized attributes of your products or services, such as organic produce or meat, raising exotic animals, or unique activities available.

- Marketing strategy. Marketing is so much more than advertising! It's about determining your price point and position in the market, and determining which marketing channels will be most effective in reaching your customers. For each product or service you plan to provide, create a roadmap that describes the product, sets the price (both for providing the product and for what you'll charge the customer), describes the messaging you'll use to promote your products,

and specific places/methods you'll use to spread the word (e.g., social media, print news, road signage, etc.)

- Create SMART Goals. To know if you're succeeding in your marketing plan, you need to have benchmarks by which to measure yourself. Goals should be objectives that focus on outcomes such as customer satisfaction, revenue levels, number of visitors during peak season, etc. The S.M.A.R.T. \ acronym can help you set meaningful goals:

Specific. Goals that are ill-defined are nearly impossible to achieve.

Measurable. What gets measured get done. Pick criteria by which you'll be able to gauge your performance and be able to tweak activities to enhance your goals.

Achievable. Be realistic - push yourself, but don't set the bar so high that it becomes meaningless.

Relevant. Make sure your goals directly correlate to positive outcomes for your business.

Time-bound. Set a date and/or timeframe for evaluating progress on your goal.

- Financial Analysis. A rule of thumb for a beginning agritourism operation is that 10 to 30 percent of gross revenues should be invested in marketing. Create an itemized budget listing the costs of your marketing activities, and provide a forecast of what sales will result from your efforts. Even if you aren't certain of all the expenses and revenues, do the best you can to be thorough and use educated estimates.

In your plan, clearly state marketing goals with regard to the number of visitors, revenue and expenses, etc. Assess your success in meeting these goals over time. Make sure your plan is flexible, so you can adapt to changes in the marketplace or results that do not match expectations as you monitor your business's progress.

Additional Marketing Resources on page 14



You're in the driver's seat!

Image: a farm visitors snaps a selfie in a large tractor at Villicus Farms. We are grateful to Doug Crabtree and Anna Jones-Crabtree of Villicus Farms for generously sharing their Volunteer Assumption of Risk Waiver form, which can be found on page 19, in the Safety and Risk Management section.



Other Resources

Montana Office of Tourism & Business Development

All of the Montana Office of Tourism and Business Developments (MOTBD)'s partners, programs, and tourism research are available at:

<http://www.marketmt.com>.

Reach out at (406) 841-2870.

Business Assistance

MOTBD's Business Technical Assistance Bureau provides assistance in the areas of marketing, small business counseling, Indian Country Programs, export and trade, capital formation, and intellectual property.

The Governor's Conference on Tourism & Recreation is the annual gathering of Montana's tourism and recreation industry, offering resources, local success stories, access to marketing workshops and data, and more. The conference moves locations each year. Find more at <http://www.MTGovernorsConference.com>.

Consumer Marketing

MOTBD's consumer website is <http://www.visitmt.com>. The "Things to Do: Food and Drink" page compiles items such as breweries, craft distilleries, farmers' markets, and agricultural tours, and is searchable by region at <http://www.visitmt.com/things-todo/food-and-drink.html>.

The Montana Brand

In 2007, the Montana Office of Tourism and Business Development facilitated a statewide initiative to unify, under a single brand, the diverse collective of organizations working to market Montana. Today, the Montana Brand is the foundation of MOTBD's programs to promote the state as a place to visit and do business. The Montana Brand consists of three pillars:

- 1) More spectacular, unspoiled nature than anywhere else in the lower 48
- 2) Vibrant and charming small towns that serve as gateways to our natural wonders
- 3) Breathtaking experiences by day, and relaxing hospitality at night

You can learn more about using the Montana brand at this site: <http://marketmt.com/Resources/TheMontanaBrand>.

Made in Montana Program



This program assists Montana businesses in developing and marketing their products both in and out of the state. It includes Grown in Montana and Native American Made in Montana, and builds recognition for products that are "authentically" Montana. That means the products are grown, created, made, and/or enhanced in the state resulting in 50% or more added-value.

The program requires that individuals and businesses meet the program's value-added definition to utilize the trademarked image on their qualifying products. Membership includes a free online directory listing as well as wholesale sales opportunities. Also important is the integration of Made in Montana promotion with tourism marketing and business development through the Montana Department of Commerce and other partners.

Program membership is FREE to qualified participants and to date more than 3,500 producers/growers, and 250 retail locations and restaurants are participating in the value-added program. To join or learn more go to www.madeinmontanausa.com.

The program is part of the Montana Tourism and Business Development Division of the Montana Department of Commerce, a state agency.

The Community Food and Agriculture Coalition (CFAC)



Identifying Your Market

CFAC's Farmlink Program identifies two key steps in identifying and understanding the market for your products - market analysis, and market differentiation. Farmlink has published two accessible workbook modules to help producers work through these two steps,



including worksheets and templates to help producers organize and understand their data, and develop a plan to move forward to successfully market their product. Each workbook is around a dozen pages and both are available at <https://www.farmlinkmontana.org/resources/marketing/>.

AERO

The Abundant Montana Directory

Formerly a printed booklet, AERO's Abundant Montana Directory is now online at www.abundantmontana.org, and is the largest and most comprehensive directory in the state of local food and sustainable agriculture opportunities. It links locals as well

Explore, learn more, and submit your listing today.



tourists to Montana food experiences, and provides free advertising and outreach for producers, farmers, local food and beverage markets, and more. Explore, learn more, and submit your listing today.

Touring the Underground: A Two Day Tour of Sustainable Farming in Montana's Golden Triangle

With the participation of five farms, Timelss Natural Food, and *Lentil Underground* author Liz Carlisle, AERO put on a two-day farm tour that traveled hundreds of miles across the state to visit five farms featured in the award-winning book about lentil growers and sustainable farms in Montana. AERO received a small grant for the program through Western SARE PDP. While we have not yet released a public narrative, we are happy to talk with you about our marketing successes, mistakes, and lessons learned. Give us a call at (406) 443-7272.

Montana Department of Agriculture

The Agriculture Marketing and Business Development Bureau
The Agricultural Marketing & Business Development Bureau is responsible for market enhancement and development through direct market development activities, grants, seed capital loan investments in new and innovative products or process, marketing, and product development. Marketing and agri-business development personnel work closely with individuals and

organizations to promote and enhance our agriculture industry. They assist individuals, businesses, industries, and regional economic development organizations with ag-related business development planning, project coordination, legal and regulatory assistance, and other services. Programs and staff focus on business start-up and expansion, as well as business recruitment and relocation projects. You can access their resources here: <http://agr.mt.gov/Marketing>.



Images by AERO from *Touring the Underground*.
Above: Manuel Ranch in Havre.
Below: Jacob Cowgill of Prairie Heritage Farm in Power.



(Other Resources continued from page 15....)

North Carolina Agritourism Manual

So You Want to Start an Agritourism Farm?

This manual, available online, is somewhat dated but includes useful basic steps and checklists, with a worthwhile discussion on networking, and tips and ideas for marketing your farm's unique experience on pages 7-8. Online at <http://nc-ana.org/docs/StartingAgritourismBusiness.pdf>

Vermont Agritourism Best Practices and How To-'s

Vermont Knows What's Up

The University of Vermont's Agritourism Collaborative has a number of resources available at <http://www.uvm.edu/vtagritourism/?Page=guides.html> including a Best Practices in Communications Marketing, which directly address topics such as the Five P's of Marketing, writing a marketing plan, and price-setting. This short document is highly readable, contains local success stories, and an excellent additional resources section. Find it at <http://www.uvm.edu/vtagritourism/files/agritourism-guide/bestpractices-marketing.pdf>

Oklahoma Agritourism Partnerships

Business Development and Marketing

The Oklahoma Department of Agriculture, Food and Forestry, and the Oklahoma Tourism and Recreation Department have teamed up to offer a producer website for the Oklahoma Agritourism Program which you can find online at <http://producer.oklahomaagritourism.com/> Their program focuses on business development and marketing, providing an on-line manual, producer workshop information, a calendar of events, and more. The resource manual can be found at <http://producer.oklahomaagritourism.com/files/OKResourceManual.pdf>



Images by AERO: from top, corn harvest work party (Bob Quinn Ranch); 2016 AERO Expo and Annual Meeting carrot taste test with Fresh Root Farm; strawbale work party (River Ranch).



SAFETY AND RISK MANAGEMENT

Managing risks to prevent incidents in agritourism operations is an important consideration. Liability insurance exists to help you mitigate losses in the event of a mishap on the farm, ranch, or other food business location. An agritourism operation may require a separate policy or an add-on to your existing farm policy. A rider is an endorsement that can be added to an insurance policy. You may also structure your agritourism operation as a separate business entity, thus

your operation, even if it involves agritourism; they should never be “the last to know.” They will explain what is and is not allowed under your current policy. Since every farm and every farm activity is unique, any agritourism activities in addition to your usual farm activity needs to be discussed with your insurance agent. That is the only way you will know what is currently covered under existing policies and what additional coverage you might need to cover your new agritourism activities. Start the conversation by asking



Image: Inspecting new equipment at the Manuel Farm during a tour (by AERO).

shielding farm and personal assets from agritourism business losses. In many cases it is possible to add additional coverages to your basic farm and ranch or home policy through a rider. Most likely, however, you will need a separate commercial liability policy to cover the agritourism activities.

Talking to your insurance agent about your agritourism plans should begin when your business planning starts. Most farm insurance agents want to support

the following questions:

- As an insurer, do you understand the proposed agritourism plans?
- To what extent does this policy cover product liability, premises liability, operations, and contracts?
- Are farm employees covered under this policy? What about volunteers?

(cont. on next page...)



(cont...)

- Would guests have to sign a waiver form?
- Should groups be required to show evidence of insurance?
- Is a property inspection necessary as part of the terms of the policy? If so, what might be inspected?
- What coverage levels would you recommend for liability (product, premises, operations, personal, and contracts)?



Image - A pair of Suffolk Punch Draft horses at B-Bar Ranch.

In the 2017 Legislative Session, Montana passed House Bill 342 which can be found here: <http://leg.mt.gov/bills/2017/billhtml/HB0342.htm>. This new law impacts producers regarding the reduction of their exposure, potentially bringing their premiums down when providing agritourism activities. The intent of the law is to make insurance more affordable for agritourism activities. Prior to this law, a farmer could be held liable for injuries caused by the inherent risks of the agritourism activity. The law defines inherent risks as dangers or conditions that are an integral part of the activity and cannot be prevented by the use of reasonable care. Now, an agritourism participant is responsible for his or her injuries or damages that result from the inherent risks of the agritourism activity.

In the future, there are three main agritourism topics that need further discussion and decision making, at the state level and/or the federal level, in terms of how agritourism is defined:

- 1) On Farm Educational Opportunities
 - a. Will the farm host a large number of kids on a regular basis? Or will the farm host a small number of visitors more sporadically?
- 2) Farms as Scenic Destinations
 - a. Ex. wedding photography and outdoor music venues - are these activities agritourism?
3. WOOFer as Volunteers - labor law issues need to be clarified and possibly amended.

General Safety Concerns to Consider

It's important to thoroughly identify safety issues associated with your business. Ask yourself:

- Are you ready for visitors?
- Is your facility ADA compliant?
- Are there plenty of restrooms?
- Are there hand-washing areas? If not, do you plan to offer hand sanitizers?
- Are ponds or other dangerous areas fenced off from visitors?
- If your mode of on-farm transportation is wagons, what safety features do they have? Do they have high rails to keep children in? Are there safety barriers to prevent accidents? Are steps into moving forms of transportation safe and secure? Are people in place to assist visitors who might have difficulty?
- Is there a plan in place to care for someone who has an accident?
- Is there a plan for cleanliness of facilities and a method for maintaining cleanliness?
- Is it clear where visitors should/should not walk, should/should not enter?
- Is there warning signage for certain hazards that can be avoided, or for listing rules of participation?

As the owner it is your responsibility to see that your visitors are safe and protected, but accidents happen. To protect yourself legally from the actions of people employed by you, you might want to consider becoming a limited liability company (LLC). An LLC is a form of business organization that is a "legal person" having one or more members organized and filing articles with the Secretary of State. As an LLC you are removing liability from you personally for others' negligence. Legal issues are complex, and you should consult your local attorney for advice in this matter.



Should you have a waiver for visitors to sign before they engage in agritourism activities on your property?

Yes. Here is an example of waiver language you can consider in conjunction with suggestions in wording from your insurance agent:

FARM VOLUNTEER ASSUMPTION OF RISK OR SHORT-TERM EMPLOYMENT AGREEMENT

(Insert paragraph describing the farm, its history and current day operations)

Farming is inherently dangerous. There is large equipment, many moving parts and significant time spent outside in the elements. Schedules and activities often change on short notice based on weather, field conditions and other factors. The Farm headquarters is located *X miles* from the nearest town (*name*) in a very rural location with limited population.

We need you to know that volunteering and/or working on our farm can expose you to personal injury or damage to your property. We will do everything possible to ensure your safety, but we expect you to honor your responsibility to actively participate in creating safe working conditions. You are agreeing to participate in the activities of a working farm. Violation of any federal, or state laws, company policies or house rules will be grounds for immediate removal off the farm.

I/we have read the above rules and have had any questions/concerns clarified by the Farm Managers. This agreement covers participation in farm activities from _____ to _____.

I agree to be a:

_____ Volunteer. By signing below I acknowledge that I have read the Volunteer Assumption of Risk and Release of all Claims. As a volunteer if you are injured or hurt on the farm our farm liability insurance has a limit of X to aid in any medical needs.

_____ Short Term Employee and will be compensated at a rate of \$ _____ plus Room and Board valued at _____. As a short-term employee you will be included on our payroll and covered

under our workman's compensation plan. You agree to fill out a W4 and I9 forms.

Signature(s) _____

Date: _____

Farm Manager Signature _____

Date: _____

List emergency contact information and any allergies or conditions we should know about in case of emergency. _____

Volunteer Assumption of Risk and Release of All Claims

1. Volunteer Status.

I would like to volunteer in activities at (insert farm name). I understand that as a volunteer I will not be paid for my efforts and I will not be covered under workers compensation insurance. I am at least 18 years of age and I will get the consent of the Farm to bring anyone younger than 18 to the Farm.

2. Risks of Volunteering

I understand that the activities at the Farm involve serious risks. I may be exposed to, for example, but not limited to: insects; wildlife; farm animals; inclement weather; extreme temperatures; heavy machinery; tools; the actions and negligence of employees, volunteers, and other people present on the farm; and dangerous conditions on the land such as holes in the ground or barbed wire. I understand that these examples are not all-inclusive and there may be additional risks, all of which may involve serious personal injury, death, or damage to my property.

3. Release of Claims and Assumption of Risk

In exchange for the opportunity to participate in activities on the Farm, I (and my family, heirs, and personal representatives) willingly and knowingly release the Farm and its officers, owners, employees and agents from any and all liability for any personal injury or damage relating to my participation. I (and my family, heirs, and personal representatives) agree to assume all of the risks and responsibilities of my participation. I understand that I am solely responsible for any hospital or other costs arising out of any personal injury or

(cont. on next page...)



property damage relating to my participation on the Farm.

4. Medical Care Authorized

I am physically fit to participate in activities at the Farm. I understand that there are no medical services available on site, and I give permission to the Farm to authorize emergency medical treatment for me. I release the Farm and its officers, owners, employees and agents, from liability for any injury or damage that might extend from such emergency medical treatment. I further agree that this waiver should be interpreted as broadly and inclusively as state law permits.

Keep in mind the following language:

Any waiver or release for a sport or recreational opportunity must:

- (i) state known inherent risks of the sport or recreational opportunity; and
- (ii) contain the following statement in bold typeface: By signing this document you may be waiving your legal right to a jury trial to hold the provider legally responsible for any injuries or damages resulting from risks inherent in the sport or recreational opportunity or for any injuries or damages you may suffer due to the provider's ordinary negligence that are the result of the provider's failure to exercise reasonable care.

Resources

A safety and risk management publication from the University of Vermont covers the following topics: Develop a Farm Safety Plan, Maintain a Safe Environment, Plans of Operation, Staff Education and Training, Emergency Response, The Four P's of Liability: Premise Liability, Product Liability, Property Liability, Personal Liability, Protecting Yourself Legally. To read the full publication, follow this link: <https://www.uvm.edu/vtagritourism/files/agritourism-guide/bestpractices-safety-risk-management.pdf>

On a more local level, the Farm Link Montana program provides a useful website on risk management that includes a link to a fifteen page module which covers food safety, market risks, financial risks and more.

You can find those resources here: <https://www.farm-linkmontana.org/resources/risk-management/>

National Resources on farm safety and risk management include the following:

National Ag Law Center

<http://nationalaglawcenter.org/>

Farm Commons

<https://farmcommons.org/insurance>

Office of Montana State Auditor

Benjamin C. Tiller

Staff Attorney

Montana State Auditor

Commissioner of Securities & Insurance

btiller@mt.gov

(406) 444-3467

<http://csimt.gov/insurance/>



Image: Mill Creek Farm, from Farm to Fork Tours .



ADDITIONAL RESOURCES

Montana

Montana Office of Tourism & Business Development

*Montana Office of Tourism & Business Development
Industry Services & Outreach Bureau*

www.Marketmontana.com,

www.MadeinMontanaUSA.com

301 South Park

P.O. Box 200533

Helena, MT 59620-0133

Ph: 406-841-2870

Our efforts are focused on helping the state's communities and businesses utilize tourism as a tool to improve the local, regional and state economy while protecting or improving the quality of life for Montana's residents through education and grants. This program supports Farmer's Markets and agritourism opportunities through the Made in Montana program,

which also includes the Grown in Montana logo, and by promotion of events through destination visitor websites and social media.

MT Department of Agriculture

<http://agr.mt.gov/Agritourism>

Steph Hystad

Montana Department of Agriculture

302 N Roberts

Helena, MT 59601

Phone: 406.444.5425

E-mail: shystad@mt.gov

Fax: 406.444.9442

Reach out to our marketing staff for guidance on how to start, market, and maintain your agritourism enterprise. In addition to our marketing consultations, our website offers a sampling of agritourism activities available in Montana. Additional resources for agritourism activities are added on a regular basis, so check back often.



Image: Horse-drawn wagon, from B-Bar Ranch.



MT Food and Ag Development Centers

<http://agr.mt.gov/FADC>

The Montana Food and Agricultural Development Center (FADC) Network helps Montanans innovate and grow businesses that produce and commercialize food, agricultural and renewable energy products and processes, creating wealth and jobs in our communities and on our farms and ranches. The centers - located in Joliet, Havre, Ronan, and Great Falls - operate as a statewide network serving community-based businesses throughout Montana.

Community Food and Agriculture Coalition

<http://www.missoulacfac.org/>

Mail: P.O. Box 7025, Missoula, MT 59807

Office: 328 E Main, Missoula – feel free to stop by!

Phone: 406-926-1004

Email: cfacinfo@missoulacfac.org

CFAC envisions a future where houses, farms, and ranches thrive; people are well-fed and food secure; family farms are sustainable, successful, and supported within a community food system; and farmers and ranchers can access the land they need.

MSU Extension

MSU Extension

Patricia McGlynn, Ph.D.

Montana State University

Agriculture Extension Agent

Phone: 406-758-5554

Fax: 406-758-5881

pmcglynn@flathead.mt.gov

Montana Farmers Union

<https://montanafarmersunion.com/>

P.O. Box 2447

300 River Drive North

Great Falls, Montana 59403

Phone: (406) 452-6406

Toll Free: 1-800-234-4071

Fax: (406) 727-8216

The Montana Farmers Union is a statewide grassroots organization working for family farmers, ranchers and rural communities through conferences, scholarships and other educational opportunities as well as legislative representation and support for producer-owned co-ops.



Headwaters RC&D

<https://www.headwatersrcd.org/press>

Thornton Building, 2nd Floor

65 East Broadway

Butte, MT 59701

Phone: (406) 533-6781

Headwaters RC&D launched their FARM program, Food Alliance of Rural Montana, in October of 2017. The program is designed to support food and agriculture producers and processors with business needs, food safety trainings, marketing and product development with the goal of growing the statewide trend of local food that is centered in Southwestern Montana.

Small Business Development Center Network

www.sbdc.mt.gov

301 S. Park Ave.

P.O. Box 200533

Helena, MT 59620-0501

Phone: (406) 841-2870

The SBDC network provides tools and guidance to help small businesses succeed. For an individual that is looking to start a new business or expand their existing business, the SBDC network is the best place to start. The SBDC network supports ten centers around the state, focusing on counseling in areas such as financial analysis, business planning, training and workshops and loan packaging assistance to help small businesses achieve their goals of growth, expansion, innovation and success.

Images - Above: Pumpkins at Red Hen Farm.
Right: Goat kids at ABC Acres.



National

For Agritourism locations around the U.S. and the world visit <https://agritourismworld.com/>

Ag Resource Marketing Center

A National Information Resource for Value Added Agriculture

From marketing, to production, to management, this national site provides resources that span the spectrum of agricultural business development. Learn more here <http://www.agmrc.org/commodities-products/agritourism/>



Oregon Agritourism Network

<http://industry.traveloregon.com/industry-resources/product-development/culinary-and-agri-tourism-development/oregon-agritourism-network/>, including some webinars. Pick your favorites!

Suggested Online Reading References

<http://www.naturalresources.msstate.edu/resources/agritourism.html> This Web site provides links to other states resources in agri-tourism.

<http://www.nrcs.usda.gov/technical/RESS/alternative-enterprise/resmanual.html> Alternative Enterprises and Agritourism: Farming for Profit and Sustainability Resource Manual – this Resource Manual contains 2,300 pages of reference material. It is divided into 20 chapters and 37 subchapters to guide you to a subject of interest. Among the most interesting parts of this

manual are the 200 pages devoted to success stories in agri-tourism.

<http://extension.tennessee.edu/publications/pbfiles/PB1754.pdf> Agritourism in Focus, A Guide for Tennessee Farmers, Extension PB 1754 from the University of Tennessee has 10 chapters and an appendix that deals with topics of agri-tourism operations. This is an excellent manual to assist people beginning an agri-tourism venture.

<http://www.sare.org/publications/naf2/naf2.pdf>

The New American Farmer is available on this website. It contains success stories of on-farm operations. www.latour.lsu.edu is a Louisiana tourism data Web site maintained by the Louisiana Sea Grant College program at LSU and the Louisiana Office of tourism, Department of Culture, Recreation, and Tourism. The site contains recent statistical data, resource materials such as impact reports, demographic projections, industry trends, and links to various tourism Web sites.

Agricultural Tourism Publications and Web Resources “Agritourism in New York: A Market Analysis,” Duncan Hilchey and Diane Kuehn. Available from <http://www.nysgextension.org/tourism/tourism/agritou.htm>; several other documents can be found via this link. Agritourism in New York State, Opportunities and Challenges in Farm-based Recreation and Hospitality.

<http://www.mda.mo.gov/AgBusiness/resources/agritourism.htm>

This site has a fairly comprehensive list of resources some of which you can access from their site - some of the resources on their list that I found most useful are listed below. Agritourism, Virginia Tech, Publication Number 310-003, 2001. Available on line at: <http://www.ext.vt.edu/pubs/agritour/310-003/310-003.html>

<http://www.sfc.ucdavis.edu/agritourism/agritour.html>

A Primer on Agritourism and Ecotourism Start Ups and Management, Desmond Jolly.

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Marketing on the Edge, A Marketing Guide for Progressive Farmers. Available from the Canadian Farm Business Management Council, 888-232-3262 or www.nafdma.com - look under publications in bookstore. North American Farmers' Direct Marketing Association. This is the number one organization promoting Agritourism and Farmer to Consumer Direct Marketing.

ATTRA - National Sustainable Agriculture Information Center www.attra.ncat.org. 1-800-346-9140
ATTRA has an extensive list of publications if you have not already discovered them; you will find many useful titles. Look for the publication: Entertainment Farming and Agri-Tourism -Business Management Guide. This is a good overview of what is involved.

Getting Started in Agritourism Page 19 USDA-NRCS www.nrcs.usda.gov They have a publication entitled Alternative Enterprises and Agritourism (not accessible via the web). Check with your county/regional NRCS office and ask them to get you a copy.

Helpful Agritourism Links by Topic

Safety

<http://www.uvm.edu/vtagritourism/files/presentations/visitor-food-safety-action-plan.pdf>

University of Vermont – Safety Plan

<http://www.uvm.edu/vtagritourism/files/safety-considerations-purdue-extension.pdf>

University of Tenn. Extension. – Safety Considerations

Guides

<http://www.uvm.edu/vtagritourism/files/presentations/farm-to-table-dinners.pdf>

Fat Moon Farm – Guide to Farm to Table Event

<http://www.uvm.edu/vtagritourism/files/presentations/creating-people-friendly-farms.pdf>

Fat Moon Farm – People Friendly Farm Guide

<http://www.uvm.edu/vtagritourism/files/presentations/niche-within-agritourism-industry.pdf>

Pam Knights Communications - What is Your Niche

USDA/NRCS - https://www.nrcs.usda.gov/wps/portal/nrcs/detail/national/technical/econ/references/?cid=nrcs143_009750

Diverse set of resources: <https://www.nal.usda.gov/afsic/agritourism-and-farm-tours>

Business/Financial Planning

<http://www.uvm.edu/vtagritourism/files/business-planning-purdue-extension.pdf>

University of Tenn. Extension Agency

<https://www.misa.umn.edu/publications/buildinga-sustainablebusiness>

University of Minnesota -
Building a sustainable business



Image: The vineyard in winter at Spotted Bear Vineyard and Lavender Farm.



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http://agritourism.rutgers.edu/corn_maze/

Rutgers - Budgeting for a maze

<http://www.uvm.edu/newfarmer/costpricingfactsheet.pdf>

OK State University – Cash Records to Cost of Production

http://www.uvm.edu/newfarmer/marketing/marketing_resources/Pricing_RAFFL.pdf

Rutland Area Farm and Food – Step by Step to Setting

Marketing

<http://sfj.ucdavis.edu/agritourism/factsheets/market1/>

Marketing your Enterprise – University of California Cooperative Extension

Funding

<https://www.ams.usda.gov/services/grants>

USDA Agricultural Marketing Service

www.gta.mt.gov

Montana Department of Agriculture - Growth Through Agriculture Grants and Loans

<http://marketmt.com/Finance#Economic-Development-Revolving-Loan-Funds-1984>

Montana Department of Commerce - Office of Tourism and Business Development

Image: Preparing a brick oven pizza for participants on the Farm to Fork Bike Tour.





Image: Horses at the B-Bar Ranch watch a herd of elk move through the field.
Front cover image: Scottish Highland cattle at ABC Acres. Photos courtesy of the farms.

Developing Montana's Agritourism: A Resource Manual was researched, written, and designed by AERO staff, with Kaleena Miller at the researching and writing helm, and Corrie Williamson overseeing design and layout. Steph Hystad of the Montana Department of Agriculture also contributed significantly to the manual's creation.

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