



Resilience Self-Assessment (RSA)

Instructions: Select the number or letter of your best response from the "Answers" column. Enter a number in the "Number Score" column and a letter in the "Letter Score" column.

A. Business Formation

This section evaluates your understanding of limited and unlimited liability and business entity types. For entities with multiple owners this section evaluates if the entity has been properly formed and capitalized, and if the governing agreement addresses critical issues.

			# Score	Letter Score
A.1.0	Who owns your business?	A = I own it by myself B = I own it with my spouse C = I own it with other family members D = I own it with other people to whom I am not related by blood or marriage E = It is my parents, but I help and work in some way. F = STOP = It is a non-profit		
A.1.1	If answered #B: Do you and your spouse file taxes as a partnership or a qualified joint venture?	0 = No, I do not know about this 1 = No, we file jointly but report the farm income under one spouse's social security number 2 = Yes, we do this so that both of us can pay into Social Security and Medicare		
A.1.2	If answered #C, #D or #E: Do you have a written partnership or operating agreement?	0 = No 2 = Yes and skip to A.2.0		
A.1.3	Do you plan to make a written partnership or operating agreement?	0 = No 1 = Maybe 3 = Yes but need help 4 = Yes, totally under control		
A.2.0	Have you formed an LLC to own your business?	4 = Yes and skip to A.3.0 0 = No		
A.2.1	Do you understand how forming an LLC or a corporation will protect you and your family?	0 = No 2 = Sort of 3 = Yes		
A.2.2	Do you understand that if you are a sole proprietorship or a partnership you have unlimited personal liability for debts or lawsuits against the business?	0 = No, I have not heard about this 1 = I've heard of this, but don't understand it 2 = I understand a little 3 = I understand, but I don't know how to act on my knowledge 4 = I understand and am acting on my knowledge (i.e. already incorporated, or process started)		
A.2.3	Do you understand that if you are a partnership you and your spouse may be personally responsible for debts or lawsuits related to your partner's activities in the business?	0 = No, I have not heard about this 1 = I've heard of this, but don't understand it 2 = I understand a little 3 = I understand, but I don't know how to act on my knowledge		

			# Score	Letter Score
		4 = I understand and am acting on my knowledge (i.e. already incorporated, or process started)		
A.3.0	Did anyone who you do not consider to be a business owner contribute assets to the business, such as cash or equipment, with the expectation of being repaid from the business?	0 = No 2 = Maybe 3 = Yes		
A.3.0	Did anyone who you do not consider to be a business owner contribute assets to the business, such as cash or equipment, with the expectation of being repaid from the business?	0 = No 2 = Maybe 3 = Yes		
A.4.0	this question is now blank			
A.5.0	When you started your business did any owner contribute non-cash assets to the business?	0 = No and skip to A.6.0 2 = Yes 1 = Don't know		
A.5.1	Did you value the assets at fair market value on the date of contribution?	4 = Yes 1 = No, or do not know		
A.6.0	Do you know how to track money or other assets such as equipment you put into your business?	0 = No idea 1 = I've been sort of wondering about this 2 = I understand a little but don't know what to do 3 = Some one showed me or set up a process for me to follow, but I don't fully understand it 4 = I understand it and I am 100% confident it is all correct in my accounting system and I can keep it that way over time		
A.7.0	If A.1.0 is C or D: Did a CPA or an attorney help you with your written partnership, LLC, or corporation agreement? (all others skip to A.Z.1)	4 = Yes 0 = No		
A.7.1	Does your agreement state that owners will be paid a salary based on hours worked?	1 = No 3 = Yes		
A.7.2	Does your agreement limit owner's ability to contribute additional funds to the business or incur expenses on behalf of the business?	1 = No 3 = Yes		
A.7.3	Does your agreement specify under what circumstances an owner may take cash from the business?	1 = No 3 = Yes		
A.7.4	Does your agreement specify under what circumstances an owner must contribute additional cash to the business?	1 = No 3 = Yes		
A.7.5	Does your agreement limit the amount of cash an owner or an owner's spouse can take out of the business in the	0 = No 4 = Yes		

			# Score	Letter Score
	event of death, injury, divorce or other change of circumstance?			
A.7.6	How well would you say you understand guaranteed payments, additional contributions, and planning for an owner to exit?	0 = No idea 1 = I have heard of these things but I do not know how they apply to me and my business 2 = I understand a little but don't know what to do 3 = I understand some but not all of these things, I have questions and need more information about this 4 = I understand all of these things and I am 100% confident that these issues have been adequately addressed in my agreement		
A.Z.1	How important is it to you to learn more about how and why to form a separate entity for your farm or ranch business?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		

B. Land

This section evaluates if you have secure land tenure, if you know how to find new land, if you know how and why to own land separately from your business, if you understand the tax treatment of land improvements and permanent crops, and if you are in compliance with significant environmental regulations.

			# Score	Letter Score
B.0.0	Are you an enrolled member of a federally recognized tribe?	A = No and skip to B.1.0 B = Yes		
B.0.1	Do you farm or ranch on individual trust land (also called allotments) Tribal trust land, or restricted fee land?	A = No and skip to B.1.0 B = Yes		
B.0.2	Are you aware that enrolled tribal members farming or ranching on certain types of trust land may be exempt from some state regulations and taxes, and may be subject to regulations and taxes of the tribe?	0 = No, I don't know about this. 1 = I know something about this, but not how it applies to my business. 2 = I know I am exempt from state regulation, but I don't know if there are federal or tribal regulations I have to comply with. 3 = I know I have to comply with some federal or tribal regulations but I need help learning more about this. 4 = I am confident in my understanding of federal or tribal regulations apply to my business.		
B.1.0	Do you own any of the land you farm or ranch?	A = No and skip to B.2.0 B = Yes		
B.1.1	Do you own the land as a tenancy in common with other family members? (This is property passed without wills and may be called "Heirs Property" or "Fractionated Land")	A = No and skip to B.2.0 B = Yes		

			# Score	Letter Score
B.1.2	Do you have an agreement with the other owners about your right to use the land?	0 = No, I don't even know all of them or how I would do that. 1 = No, some of them know and some of them don't. 2 = It's an informal agreement, not in writing, but the other owners know and agree. 3 = The other owners don't have to agree to let me use it and I don't have to pay them rent. 4 = I have a written agreement from all the other owners, this allows me to access some USDA programs and financing.		
B.1.3	Do you pay yourself rent? This means having the farm business pay rent to you as the landowner, or to all the landowners, including you.	0 = No 2 = Sometimes 4 = Yes		
B.1.4	Did the person you bought the land from finance the purchase? This means you make regular payments directly to the person you bought the land from until you pay off the land.	A = No, and skip to B.2.0 B = Yes		
B.1.5	This kind of financing is called "seller-financing" or sometimes a "land contract." In some states buyers have limited protections if they default on this type of agreement. Are you aware of what you would lose if you had to default on your contract?	0 = No, I do not know what would happen if I stopped paying 1 = I think it would be the same as if I stopped paying a mortgage - but I don't know if that is true 2 = I think I have less rights than if I had a mortgage but I don't really know the differences 3 = I understand that I would lose all the money I paid in, even if the property had gone up in value, but I do not understand what my rights would be to get the property back, or how long between when I stopped paying and when I would lose the property. 4 = I understand what would happen under my state's laws if I defaulted on this kind of purchase.		
B.2.0	Do you rent, cash lease or crop share any of the land you farm or ranch'?	A = No, and skip to B.3.0 B = No rent paid (some sort of agreement) C = Yes, rent paid (cash or crop share)		
B.2.1	Is your agreement in writing?	4 = Yes, and go to 2.3 0 = No and continue to 2.2		
B.2.2	Do you have a plan to get a written lease or crop share agreement?	0 = No 2 = Intend to but need help 3 = We are working on it		
B.2.3	Do you have an agreement about leasing to own, or right of first refusal, or some other agreement about purchasing the land?	1 = No, and skip to B.3.0 2 = Yes		

			# Score	Letter Score
B.2.4	How is your lease to own or right of first refusal agreement documented?	0 = It is a verbal agreement and I have not paid any extra money beyond rent to have this agreement 1 = It is a verbal agreement, but I made a payment separate from rent to secure this agreement 2 = The agreement is in writing, but I have not paid anything extra for it, I just pay fair market rent 3 = The agreement is in writing, but there isn't anything written down about paying extra for the right of first refusal option or for the land purchase, but I have made one or more payments towards the option or the purchase, or I pay a little extra with rent when I can, and that money goes towards the purchase. 4 = The agreement is in writing including how much I paid for the right of first refusal option or how much I put down for the land, and it is clear how much I am paying towards rent and how much I am paying towards the option or the purchase.		
B.3.0	Do you plan to purchase land to farm in the next 5 years?	A = No, and skip to B.4.0 B = Yes or maybe		
B.3.1	Do you know how to determine how much farm or ranch land you can afford to purchase?	0 = No 1 = maybe 2 = Yes		
B.3.2	Do you know how to find farm or ranch land for sale and how to assess its suitability for your needs?	0 = No 1 = maybe 2 = Yes		
B.4.0	Do you plan to lease new or additional land to farm in the next 5 years?	A = No, skip to B.5.0 B = Yes or maybe		
B.4.1	Do you know what terms are important to have in a farm or ranch lease?	0 = No 1 = Maybe 2 = Yes		
B.4.2	Do you know how to find farm or ranch land to lease and how to assess its suitability for your needs?	0 = No 1 = Maybe 2 = Yes		
B.5.0	How many acres of farm, timber, or rangeland total do you own and/or lease? Include forest land, roads, and unfarmable hills or waterways, but not the area where you live.	enter # of acres in "Letter Scores" box		
B.5.1	Of these acres, how many are used in your farm or ranch operation?	enter # of acres in "Letter Scores" box		
B.6.0	Are you registered as a business with the County Property Tax Assessor? (For paying county property taxes on your farm equipment, this is different from property taxes on the land itself. This question does not apply to allotment or trust land.)	0 = No or I don't know 4 = Yes or I have verified that I am exempt		

			# Score	Letter Score
B.7.0	If you are not in a rural or agricultural area have you confirmed that your business activities are not violating any local zoning ordinances?	skip if N/A 0 = No or I don't know 4 = Yes skip if N/a		
B.8.0	What is your source of water for farming?	A = City B = Well C = River D = Irrigation District E=Pond(s) F= other		
B.8.1	If you are on leased land - Is the maintenance of the well and pump addressed in your lease?	0 = No or I don't know 4 = Yes SKIP IF N/A		
B.8.2	If yes: Whose responsibility is it to fix the well or pump?	1 = Mine 2 = Mixed 3 = Owner's		
B.9.0	Where does excess water drain from your fields?	0 = I don't know 2 = City sewer, drainage ditch, natural drainage on property, to creek, river etc.		
B.9.1	Are you aware of regulations about irrigation runoff?	0 = No 1 = A little 2 = I don't think it applies to me 3 = I need help understanding this or acting on this information 4 = I am 100% sure I am informed and engaged and in compliance		
B.10.0	Do you plan to clear any hillside or riparian vegetation or to grade or level on a hillside or near a riparian area?	0 = No or N/A and go to B.11 1 = Maybe 2 = Yes For 1 or 2 continue		
B.10.1	Are you aware this may require a permit from your county, state, or tribe in order to comply with county regulations and state environmental regulations?	0 = No 1 = A little 2 = I don't think it applies to me 3 = I need help understanding this or acting on this information 4 = I am 100% sure I am informed and engaged and in compliance		
B.11.0	For landowners only: Were there improvements on the land when you bought it such as ag buildings, fences, irrigation infrastructure or permanent crops?	0 = No and skip to B.13.0 4 = Yes		
B.11.1	Did you have a farm appraisal done when you bought the farm? (An appraisal by a certified farm appraiser that assigns value to agricultural assets and to the acreage taking into account soil quality.)	0 = No 4 = Yes		
B.11.2	Did your CPA record the farm assets on your farm tax return and take appropriate depreciation in the year	0 = No 4 = Yes 1 = I haven't started farming yet or it is just a hobby right now		

			# Score	Letter Score
	you bought the farm?			
B.12.0	Do you have an estate plan that addresses how the land will be transferred to future owners and maintained in agriculture?	0 = I do not have an estate plan (a will, a trust, and other related plans) 1 = I have a will, or a will and a trust, but I wouldn't say there is an overall plan for my estate as a whole. 2 = I have an estate plan but it does not specifically address the land or keeping the land in agriculture 3 = I have an estate plan and the land is addressed, but I don't really know if the land will stay in agriculture and I have questions or wonder if my plan could be better. 4 = I have an estate plan and I am confident that it addresses all important considerations related to the land.		
B.12.1	Does your estate plan consider any special state provisions to allow family members to transfer property without having the property re-assessed?	1 = I do not know how my estate plan relates to future property taxes for my heirs 2 = I believe my estate plan addresses the issue of future property taxes for my heirs but I am not certain 3 = I know that the issue of future property taxes for my heirs is addressed in my estate plan, but I do not know if my heirs understand it 4 = I know that the issue of future property taxes for my heirs is addressed in my estate plan, and my heirs also understand how this will work		
B.13.0	If you have livestock, do you plan to add fencing?	A = No, skip to B.14.0 B = Yes		
B.13.1	Are you aware that the EQIP program can assist with these expenses?	0 = No 2 = sort of 3 = Yes I would like help applying 4 = Yes and I have applied or determined the program is not right for me		
B.14.0	Are there riparian or other ecologically sensitive areas on or adjacent to your land?	A = No, skip to B.15.0 B = Yes, and continue		
B.14.1	Are you aware that the EQIP program can assist with conservation projects?	0 = No 2 = sort of 3 = Yes I would like help applying 4 = Yes and I have applied or determined the program is not right for me		
B.15.0	For land owners only: Is there a conservation easement on your land?	0=No = go to B.15.2 1=Yes = go to B.15.1 then skip B.15.2 and go to next section		
B.15.1	Do you understand the importance of meeting annually with a compliance officer from the organization that holds your easement?	0 = No, not at all 2 = They do not contact me 4 = Yes, they visit once a year		
B.Z.1	How important is it to you to learn more about how to purchase farm or ranch land? This includes how to calculate what you can afford and	A = Not important B = Somewhat important C = Important but not a priority		

			# Score	Letter Score
	how to assess if land is suitable for your needs.	D = Important E = Very important/high priority		
B.Z.2	How important is it to you to learn more about how to lease farm or ranch land? This includes how to find the right land to lease, why to have a lease, what the lease should say.	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
B.Z.3	How important is it to you to learn more about environmental regulation of agricultural lands and how to be in compliance?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
	How important is it to you to learn more about how a conservation easement works as part of an estate plan or to learn more about placing a conservation easement on your land?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		

C. Accounting

This section evaluates your bookkeeping and accounting practices to ensure that you have a system sufficient for tax and managerial accounting and that you understand how to manage your business from a balance sheet perspective.

			# Score	Letter Score
C.1.0	Do you have a separate checking account for your business?	4 = Yes, and go to C.2.0 0 = No, and continue to C.1.1		
C.1.1	For no: Do you understand why this is important?	0 = No 1 = Sort of 2 = Yes, I just have not done it yet		
C.2.0	How do you keep track of your farm/ranch money, income and expenses?	0 = In my check register and I keep receipts - skip to C.4.0 1 = In Excel - skip to C.4.0 2 = On line software with limited functions (Square) choose this if you do not know if the program you use has a full chart of accounts and a balance sheet 3 = Software with a full chart of accounts and a balance sheet function (QuickBooks, Sage, etc.) or I have a bookkeeper 4 = I have a bookkeeper and I use software with a full chart of accounts and a balance sheet		
C.2.1	Did you set your system up on your own or did a trained bookkeeper or accountant help you?	1 = On my own (unless trained in accounting/bookkeeping) 2 = Got some help, not sure how good they are 3 = Got help, pretty confident 4 = Got high quality help/used a template from FarmLink, KTA, CFA, etc., or I have advanced training in this area		

			# Score	Letter Score
C.3.0	Did someone help you to determine opening balances for your business? This means the value of assets and liabilities and owners equity on an opening balance sheet for the business.	0 = No and skip to C.4.0 1 = Yes, or I have advanced training in this area and I did it myself		
C.3.1	Who was the person?	4 = Certified Public Accountant (CPA) or CPA's bookkeeper 3 = Enrolled Agent (EA), tax preparer, or bookkeeper not at a CPA firm 2 = other 2 = Don't know/not sure		
C.3.2	Do you have records to show that each of the owners contributed assets equal to their percentage ownership?	0 = No 2 = Yes		
C.4.0	Do you know how to read and understand your Balance Sheet?	0 = No 1 = Yes		
C.4.1	How often do you look at your Balance Sheet and use it as a management tool to help you understand your business?	0 = never, I do not do this 1 = I look at it sometimes but I do not understand it 2 = I look at it about once a month, but I do not really understand it, do not use it to understand my business 3 = I look at it a few times a year and I understand it, but I wouldn't say it is a key management tool 4 = I look at it most months and I use it as a management tool to help me understand my business and make decisions		
C.5.0	Do you have a system or a method to calculate your cost of production? This could be for all crops, for individual crops, fields or plantings, or for livestock by animal, flock, herd, birth month, etc.	0 = No, I do not know how to do this 1 = I have this information for my operation as a whole, but not at enough detail to help me make decisions 2 = I have this but I have questions, it is not that accurate, it is too time consuming, too confusing, not that useful, frustrating, etc. 3 = I have this but I would like to learn if there are better systems, techniques 4 = I have this and it works well for me and helps me to manage my business		
C.6.0	Do you have a system of a method to calculate your cost of sales? This means the cost of different packing or processing methods and the cost of selling into different markets.	0 = No, I do not know how to do this 1 = I have this information for my operation as a whole, but not at enough detail to help me make decisions 2 = I have this but I have questions, it is not that accurate, it is too time consuming, too confusing, not that useful, frustrating, etc. 3 = I have this but I would like to learn if there are better ways to do this 4 = I have this and it works well for me and helps me to manage my business		
C.7.0	Do you know how to determine if you should expand your operation? This means understanding how to calculate your current profitability, the cost of expanding and your predicted profitability after the expansion.	0 = No, I do not know how to do this and I have not tried to do it 1 = I have tried to do this for myself but I have not been able to figure it out 2 = My operation is at a stable size or grows very organically so this is not an important tool for me 3 = I have this but I am not confident it is correct and I would like to learn if there are better ways to do this		

			# Score	Letter Score
		4 = I have this and it works well for me and helps me to manage my business		
C.Z.1	How important is it to you to learn more about how to set up an accounting / bookkeeping system for your farm or ranch business?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
C.Z.2	How important is it to you to learn more about how to use your balance sheet and income statement to understand and manage your farm or ranch business?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
C.Z.3	How important is it to you to learn more about how to calculate your cost of production, cost of sales, or opportunities for expansion to understand and manage your farm or ranch business?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
C.Z.3	How important is it to you to learn more about how to ensure that your financial operations will continue smoothly during your temporary or permanent absence?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		

D. Taxation

This section evaluates your understanding of farm and ranch taxes and if you are aware of important planning strategies related to income taxes.

			# Score	Letter Score
D.0.0	For enrolled tribal members only - all others skip to D.1.0: Are you aware of the IRS rules for exempt "Income derived from the land"?	0 = I do not know about this 1 = I have heard of this but I do not know how it applies to me 2 = I understand about exempt income derived from the land, but I do not know if I have the right kind of land to qualify, or I know I have the right kind of land to qualify but I do not know if all my activities qualify 3 = I understand about exempt income derived from the land, and the types of land that qualify, but I have questions about my specific situation and I need more information to know if or how to report or not report my income, or I am unsure if I have been doing it correctly or if there is a better way, and I would like more information on this topic 4 = I understand about exempt income derived from the land and they types of land that qualify and I am confident that I am treating my income the right way for my situation and my goals		

			# Score	Letter Score
	<p>Instruction If you are confident all of your farming or ranching activity is exempt income derived from the land, skip to section E otherwise continue if you farm on multiple parcels of land, some of which may not qualify for the exemption.</p>			
D.1.0	Have you filed a tax return for your farm or ranch business?	0 = No and skip to D.4.0 1 = Not yet, because I am still in my first year of farming (Skip to D.4.0) 4 = Yes		
D.1.1	If you filed as a sole proprietor or a partnership did you file a schedule F to report farming or ranching activity?	0 = No 0 = Do not know 4 = Yes and skip to D.2.0		
D.1.2	For no and sole proprietor only: Did you report your farming or ranching activity on a Schedule C?	0 = Yes 1 = No		
D.2.0	What was the first year for which you filed a tax return for your farm or ranch business?	Enter year in "letter score box, or if have not filed enter 9999		
D.2.1	Is there any year when you were farming or ranching but did not file farm or ranch income taxes?	4 = No 1 = Yes		
D.3.0	How did you complete your income tax forms?	0 = I prepared directly onto IRS forms. 2 = I paid to use a computer program like Turbo Tax or HR Block online 3 = I paid a tax preparer to complete the forms for me		
D.3.1	If you used a paid preparer, was it a Certified Public Accountant (CPA) or someone else?	2 = No or do not know 4 = CPA		
D.4.0	Do you have a plan to file your taxes for this year?	0 = No, or don't know 2 = Yes		
D.5.0	If you have income between \$15,000 and \$50,000 you may qualify for an "Earned Income Tax Credit" of up to 6k. Have you heard of the EIC?	0 = No, or don't know 4 = Yes		
D.5.1	If the EIC may apply to you, are you aware that sometimes increasing business income increases the EIC?	0 = No, or don't know 4 = Yes If you know the EIC does not apply to you leave blank		

			# Score	Letter Score
D.6.0	If you have not filed: Is that because you have not yet started farming or ranching or because you need help or more information?	0 = Not started 1 = Need help -1 = I choose not to file		
D.6.1	If not started or hobby: Do you understand how a loss from farming can create a tax savings by reducing other taxable income?	0 = No, I have not heard of this 1 = I have heard of this but I do not really understand it 2 = I have been told that I would have too many loss years and would be considered a "hobby" so I did not file. 3 = I am not sure when I am officially "in business" for tax purposes 4 = I have discussed this with a knowledgeable tax preparer who I trust		
D.6.2	If you call your current farming or ranching activities a "hobby" do you know and understand the tax definition of "hobby" and how this changes your taxes?	0 = No 2 = Yes		
D.6.3	If you are in the "start up" phase of farming are you keeping track of your expenses so you can deduct them once you start farming?	0 = No 4 = Yes		
D.7.0	Are you familiar with special rules for deducting business expenses that might not come out of your business checking account? This includes deductions for business use of your home or personal vehicle, and deductions for business meals, travel, education and promotion.	0 = No, don't know about this 1 = I have heard of this but do not know enough to act on it 2 = I understand some of these deductions but not all of them, I keep track of some of this information but have questions, need more information 3 = I understand and keep records for most but not all of these deductions 4 = I understand and keep records for all of these deductions		
D.7.1	Do you keep records of the miles you drive your personal vehicle for work?	0 = No, don't know about this 1 = No, but I know I should 2 = Yes, sometimes 3 = Yes mostly, but not always, it is not a priority 4 = Yes, always, it saves me on my taxes (or in some cases, if they have a paid tax preparer, no, I know I do not need bigger tax losses)		
D.7.2	Do you have a list of farm equipment for income taxes and for county property taxes?	0 = No, don't know about this 1 = No, but I know I should 2 = Yes, to one but not both or "I think my accountant has it/takes care of that" 3 = Yes to both, but old, inaccurate, don't match 4 = Yes, to both and they match		
D.7.3	Do you take a deduction for use of an office in the home?	0 = No, don't know about this 1 = No, but I know I should 2 = Yes, sometimes 3 = Yes mostly, but I don't like it 4 = Yes, always, it saves me on my taxes (or in some cases, if they have a paid tax preparer, no, I know I do not need bigger tax losses)		

			# Score	Letter Score
D.7.4	Do you keep records of your costs to eat meals in restaurants or cook meals at home when the main purpose of the meal is to conduct business with others?	0 = No, don't know about this 1 = No, but I know I should 2 = Yes, sometimes 3 = Yes mostly, but not always, it is not a priority 4 = Yes, always, it saves me on my taxes (or in some cases, if they have a paid tax preparer, no, I know I do not need bigger tax losses)		
D.7.5	Do you keep records of promotional gifts you give to people you work with (people who help you, people you buy from, people you sell to)?	0 = No, don't know about this 1 = No, but I know I should 2 = Yes, sometimes 3 = Yes mostly, but not always, it is not a priority 4 = Yes, always, it saves me on my taxes (or in some cases, if they have a paid tax preparer, no, I know I do not need bigger tax losses)		
D.7.6	Do you take a "per diem" deduction for meals and incidentals on days when you travel away from the farm all day - such as for farmers markets?	0 = No, don't know about this 1 = No, but I know I should 2 = Yes, sometimes 3 = Yes mostly, but not always, it is not a priority 4 = Yes, always, it saves me on my taxes (or in some cases, if they have a paid tax preparer, no, I know I do not need bigger tax losses)		
D.8.0	Do you plan to construct any new buildings on your property?	A = No B = Yes or maybe		
D.8.1	Are you aware of the tax rules for capitalizing construction costs on buildings?	0 = No 2 = Sort of 4 = Yes, I have discussed this with a CPA		
D.9.0	Do you have or do you plan to plant permanent crops such as nut-trees or fruit-bearing bushes, vines, or trees?	A = No and go to D.10.0 B = Yes or maybe		
D.9.1	Are you aware of the tax rules for capitalizing the costs of permanent crops?	0 = No 2 = Sort of 4 = Yes I have discussed this with a CPA		
D.10.0	Are you aware of options for saving for retirement that lower your current income taxes or will generate tax-free earnings? (IRA, Roth IRA, SEP- IRA, Individual 401k?)	0 = No 1 = I have heard of some of these but I do not know the differences between them or how to choose one 2 = Yes I understand these plans are available, but I do not think they are right for me at this time. 3 = Yes I have discussed this with a CPA or financial planner and I understand which plan would work best for me and plan to set one up 4 = Yes I contribute to one of these types of retirement savings account annually or most years.		
D.Z.1	How important is it to you to learn more about how to get help filing your tax returns?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		

			# Score	Letter Score
D.Z.2	How important is it to you to learn more about how your farm or ranch business income or loss affects your personal tax situation?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
D.Z.3	How important is it to you to learn more about tax deductions for your farm or ranch business?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		

E. Labor and Contractors

This section assesses if you are in compliance with applicable State and Federal labor protection laws.

			# Score	Letter Score
E.0.0	For enrolled tribal members on trust land only (all others go to E.1.0) Do you understand if or how federal labor law applies to businesses operated on the tribal trust lands where you operate?	0 = No, I do not know about this 1 = I have heard of this, but I do not know how it applies to me or my business 2 = I have some knowledge about some aspects of employment taxes and regulations, but I do not know how to act on this knowledge 3 = I believe I am in compliance with some or all applicable employment law, but I have questions about some laws, if they are applicable to me and my employees or not and I need help find and more information or getting more accurate and specific answers to my questions 4 = I understand which employment laws do and do not apply to me and I am confident that I am in compliance with all applicable laws		
E.1.0	Are any of your immediate family working with you in your business but not business owners?	A = No B = Yes		

			# Score	Letter Score
E.1.1	Are you aware of the rules for family members and wages and hours worked?	0 = No 1 = A little 2 = Yes, I think I am exempt/I am doing it correctly, but I might be wrong 3 = Everyone is on payroll 4 = Yes, and I am confident I am doing it right		
E.2.0	Do you pay any people as “independent contractors” without withholding payroll taxes or filing payroll tax returns?	A = No and skip to E.3.0 B = Yes and continue		
E.2.1	Do you file a form 1099 for amounts paid in excess of \$600/year?	0 = No 2 = Mostly, or sometimes. 3 = Yes		
E.2.2	Do you know and understand the rule for who may be considered an independent contractor and who must be considered an employee?	0 = No, I have not heard of this 1 = I have heard of this, but I don’t know the rule and “I thought I was ok” 3 = Yes, but I can’t afford to pay wages and payroll taxes 4 = Yes I know and understand the rules and I follow them -1 = I understand the rules and do not and will not follow them		
E.2.3	Do you know the possible consequences of paying an employee as an independent contractor?	0 = No, I have not heard of this 1 = I don’t know, I guess I would get a fine? 3 = I would have to pay back taxes with interest and penalties and might have to pay back wages if I was paying less than minimum wage 4 = I would have to pay back taxes with interest and penalties and might have to pay back wages if I was paying less than minimum wage, and I could be fined for failure to comply with my state’s Workers Compensation laws.		
E.3.0	Do you pay any people on payroll with payroll taxes withheld and payroll tax returns filed?	A = No and skip to E.Z.1 B = Yes and continue		
E.3.1	For yes: Do you use a payroll service or do you prepare your payroll and payroll tax returns in house?	4 = Payroll service 3 = In-house by a bookkeeper 2 = I do it myself or my spouse/partner does		
E.3.2	Which payroll service do you use?	A = Don’t know B = My bookkeeper, not actually a payroll service C = QuickBooks payroll service D = Bank or accounting firm E = ADP, Paychex, Gusto, other large / national payroll service		
E.4.0	How familiar are you with minimum wage law and state and federal payroll tax reporting requirements for exempt and non-exempt agricultural labor?	0 = Not at all 2 = Sort of 3 = Somewhat, but I need help to do it 4 = Yes and I am in compliance -1 = I am familiar/aware but I am not following and I do not wish to follow		
E.5.0	Do you have “interns” or “apprentices” who make less than minimum wage or for whom you do not pay payroll taxes?	A = No and skip to E.6.0 B = Yes and continue		

			# Score	Letter Score
E.5.1	Are they working for you as part of an accredited academic or training program, or can you verify that they are exempt agricultural laborers under all the terms of your state's employment laws or the Federal Migrant and Seasonal Agricultural Worker Protection Act?	4 = Yes 1 = No 0 = Don't know		
E.6.0	If you have payroll are you in compliance with your state's requirements for Worker's Compensation Insurance?	4 = Yes 1 = No 0 = Don't know		
E.7.0	If you have payroll, how familiar are you with State and Federal Occupational Health and Safety Regulations requiring you to protect your workers?	0 = Not at all 1 = Sort of 2 = Somewhat, but I don't know if I am doing it right 3 = Somewhat, but I have questions and need help to ensure I am in compliance 4 = Yes and I am in compliance -1 = I am familiar/aware but I am not following and I do not wish to follow		
E.8.0	Do you provide lodging to any of your workers?	No= skip to E.Z.1 Yes =continue		
E.8.1	Are you familiar with housing code requirements for this type of housing?	0 = No, and skip to E.Z.1 1 = Yes, and continue		
E.8.2	Are you in compliance with local zoning requirements for the housing you provide?	0 = No 4 = Yes		
E.Z.1	How important is it to you to learn more about the rules for employing people in your farm or ranch business?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		

F. Production and Marketing

This section identifies your production and marketing practices and helps you to evaluate your business skills in managing production and marketing.

			# Score	Letter Score
F.1.0	What crops do you produce?	A = Grains, oilseeds, etc. B = Mixed annual fruits & veggies C = Flowers, herbs, gourds D = Tree-fruit, nuts, grapes, blueberries, blackberries E = Hay, forage, grain etc. for animal feed F = Livestock, dairy, eggs, etc.		

			# Score	Letter Score
F.2.0	What crops do you plan to produce?	A = Grains, oilseeds, etc. B = Mixed annual fruits & veggies C = Flowers, herbs, gourds D = Tree-fruit, nuts, grapes, blueberries, blackberries E = Hay, forage, grain etc. for animal feed F = Livestock, dairy, eggs, etc.		
F.3.0	What is your practice for harvest and immediate post-harvest handling?	H = Field pack, no cooling I = Packing shed, water, no cooling J = Packing shed & cooling K = Bulk sale for further processing L = Live animals to contract harvest and cut and wrap M = Live animals sold to a packer, packaged meat purchased back N = N/A, feed consumed on farm, animals sold live with no product returned		
F.3.1	Do you have a written food safety plan?	0 = No, I don't know what that is or if I need one 1 = No, I do not need one 2 = No, but I know I need to work on this 3 = No, I would like assistance with this 4 = Yes, I have invested in this		
F.4.0	Where/how do you sell your products?	A = Farmers market B = CSA C = Farm stand D = Wholesale E = Direct to institution, restaurant or retail F = To a processor G = Under contract H = Through a bundled CSA, internet assisted aggregation, or food hub I = Other		
F.4.1	If you have regular sales relationships, do you have a written contract that clarifies specific expectations such as quality, quantity, time and place of delivery, farming practices, pricing and adjustments, acceptance or rejection of product and the terms of payment?	0 = No idea/have not heard of this 1 = I've heard of this, but don't understand it 2 = I understand a little 3 = I understand, but I don't know how to act on my knowledge 4 = I understand and am acting on my knowledge		
F.4.2	If you make wholesale sales, are you familiar with how to ensure your legal rights to prompt and complete payment for sales made in your state or sales made across state lines?	0 = No idea/have not heard of this 1 = I've heard of this, but don't understand it 2 = I understand a little 3 = I understand, but I don't know how to act on my knowledge 4 = I understand and am acting on my knowledge		
F.4.3	Do you know how to find the price at the terminal market closest to you or in another state?	0 = No idea/have not heard of this 1 = I've heard of this, but don't understand it 2 = I understand a little 3 = I understand, but I don't know how to act on my knowledge 4 = I understand and am acting on my knowledge		
F.4.4	Do you know why it is important to know the terminal market price in another state?	0 = No idea/have not heard of this 1 = I've heard of this, but don't understand it 2 = I understand a little		

			# Score	Letter Score
		3 = I understand, but I don't know how to act on my knowledge 4 = I understand and am acting on my knowledge		
F.5.0	Are there livestock in your operation? If so what?	If no skip to F.6.0 I = Pigs or hogs M = Beef cattle N = Dairy cattle O = Meat goats P = Dairy goats Q = Lambs and sheep R = Poultry for meat S = Laying hens T = Other poultry U = Fish V = Insects W = Horses, donkeys, mules X = Aquaculture Y = Other		
F.5.1	How familiar are you with the different methods for accounting for livestock, particularly for income tax purposes?	0 = No idea/have not heard of this 1 = I've heard of this, but don't understand it 2 = I understand a little 3 = I understand, but I don't know how to act on my knowledge 4 = I understand and am acting on my knowledge		
F.5.2	How do you track your individual livestock and their vaccinations, breeding and health records, etc.?	0 = I don't 1 = Hand written records (notebook) 3 = Computerized records - informal (Excel, Word, Evernote, etc.) 4 = Computer based application or program written for this purpose		
F.5.3	What is your source of feed?	Choose all that apply: E = Purchased hay F = Grown hay G = Purchased grain H = Grown grain I = Irrigated pasture J = Non-irrigated pasture, rangeland, forage		
F.5.6	When or how do you sell your livestock?	K = Live at auction L = Live direct sale M = Whole or half carcass N = Basic cut & wrap O = Additional processing beyond cut & wrap		
F.5.7	For "M – O" ask: Do you have a written food safety plan?	0 = No, I don't know what that is or if I need one 1 = No, I do not need one 2 = No, but I know I need to work on this 3 = No, I would like assistance with this 4 = Yes, I have invested in this		

			# Score	Letter Score
F.6.0	Do you process any product beyond what is needed to safely transport it and sell it in the condition in which that product is normally sold? Examples for produce are processing beyond normal wash and pack, examples for livestock are meat products beyond basic cut and wrap.	A = No and skip to F.7.0 B = Yes and continue		
F.6.1	For yes and for enrolled tribal members on trust lands only (all others go to F.6.2): Are you aware of that income from value-added activities may not qualify as "exempt income derived from the land"?	0 = No idea/have not heard of this 1 = I've heard of this, but don't understand it 2 = I understand a little 3 = I understand, but I don't know how to act on my knowledge 4 = I understand and am acting on my knowledge		
F.6.2	For all producers answering yes: Are you aware of the income tax requirements for how to treat inventory or non-incidentals supplies?	0 = No idea/have not heard of this 1 = I've heard of this, but don't understand it 2 = I understand a little 3 = I understand, but I don't know how to act on my knowledge 4 = I understand and am acting on my knowledge		
F.7.0	Are you certified organic?	0 = No 2 = In process 4 = Yes		
F.7.1	For "0" or "2": Are you aware of USDA program assistance with certification costs?	0 = No idea/have not heard of this 1 = I've heard of this, but don't understand it 2 = I understand a little 3 = I understand, but I don't know how to act on my knowledge 4 = I understand and am acting on my knowledge		
	Hold for CCOF question			
F.8.1	Do you use a crop adviser, pest adviser, or animal ag expert?	1 = No 2 = No, I have advanced training in this area 3 = Yes		
F.9.0	Do you use or plan to use any conventional or organic pesticides, herbicides, rodenticides, etc.?	0 = No and skip to F.10.0 2 = Yes		
F.9.1	Can you show that you are exempt from or in compliance with your state's licensing requirements for commercial pesticide users?	0 = No, I do not know about this 1 = I do not think this applies to me but I could not prove that it does not apply to me 2 = I think this may apply to me but I need help understanding what to do 3 = Yes, I have made efforts to be in compliance, but I have questions 4 = Yes, I am confident I am in compliance with all applicable pesticide regulations		

			# Score	Letter Score
F.10.0	Are you aware of how your county, state or tribe regulates proper storage and disposal of pesticides and pesticide containers?	0 = No, I do not know about this 1 = I do not think this applies to me but I could not prove that it does not apply to me 2 = I think this may applies to me but I need help understanding what to do 3 = Yes, I have made efforts to be in compliance, but I have questions 4 = Yes, I am confident I am in compliance with all applicable pesticide regulations		
F.11.0	Are you aware of pest exclusion or animal disease quarantine efforts in your county?	0 = No 1 = Yes		
F.12.0	Do you purchase product from other farmers or ranchers to sell through your business?	0 = No and skip to F.Z 2 = Yes		
F.12.1	If yes, do you have written standards/protocols that guide these agreements around quality, price etc.?	0 = Not at all 1 = Sort of 2 = Yes, but it has not been reviewed by a food safety expert or a lawyer 3 = Yes and it has been reviewed by a food safety expert or a lawyer but not both 4 = Yes and and it has been reviewed by a food safety expert and a lawyer		
F.Z.0	How important is it to you to learn more about how to create and implement a food safety plan for your primary products (crops, livestock, eggs, etc.)?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
F.Z.1	How important is it to you to learn more about how to create and implement a food safety plan for value added production (processing products beyond the minimal amount needed to safely transport them to the usual first point of sale)?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
F.Z.2	How important is it to you to learn more about the rules for the safe and legal application and disposal of pesticides and other farm inputs?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
F.Z.3	How important is it to you to learn more about special certifications such as USDA Organic, or Good Agricultural Practices, or private labels like Certified Naturally Grown or animal welfare certifications?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		

G. Credit

This section helps you to evaluate if you can identify credit needs, if you know how to match your needs to different types of credit that are available, and if you are prepared to successfully apply for credit if you determine that credit would help you to accomplish your goals.

			# Score	Letter Score
G.1.0	Do you know how to do a month by month (or for some livestock and commodity operations quarterly) cash flow budget for your business?	0 = No 1 = I have seen this demonstrated but have not done it for myself 2 = I sort of tried but didn't get very far 3 = I have done this, but I have questions and need help getting it right and understanding how to use it 4 = Yes, I have mastered this skill For 0 go to G.1.2, For 1-4 continue		
G.1.1	Do you create and use a monthly or quarterly cash flow budget?	0 = No 2 = Yes		
G.1.2	Is cash flow a problem for you? This means are there some months when you owe more than you can pay, but you are owed money that has not come in yet, or you are about to sell a crop that is not quite ready.	A = No and skip to G.2 B = Yes and continue		
G.1.3	How do you manage cash flow problems?	0 = I don't pay my bills on time or I use a personal credit card 1 = With my own money "lent" to the business 2 = Both of the above 3 = With an operating loan 4 = I use an operating loan, I adapt my business plan, or I use an operating loan and I adapt my business plan		
G.2.0	Do you know how to separate your business cash flow budget from your personal cash flow budget?	0 = No 2 = Yes		
G.3.0	Do you know how to distinguish between operating credit, credit for asset purchase or improvement and credit for land acquisition?	0 = No 2 = Yes		
G.4.0	Do you have any loans for your business now, such as an equipment loan?	A = No and skip to G.5.0 B = Yes and continue		
G.4.1	Do you have an operating loan?	0 = No 2 = Yes		
G.4.2	Do you have an equipment or construction loan?	0 = No 2 = Yes		
G.5.0	Are you currently seeking or have you ever applied for a loan?	A = No and skip to G.6.0 B = Yes and continue		
G.5.2	Have you applied for a loan with the USDA Farm Service Agency?	0 = No 2 = Yes		

			# Score	Letter Score
G.5.3. ca	Have you applied for a loan with the California FarmLink?	0 = No 2 = Yes		
G.6.0	Do you understand how to read a loan payment schedule? This means understanding how the amount you pay each month goes partially towards principle (the original amount you borrowed) and partially towards interest, and how the amount going towards principle and interest changes.	0 = No 1 = Sort of 2 = Yes		
G.7.0	Do you know what a credit score is - and if so do you know what your credit score is?	0 = I don't know what a credit score is 1 = I know what a credit score is but don't know my score 2 = I know my credit score, but I don't know what it means 3 = I know my credit score but I need help to understand what it means and how to improve it		
G.7.1	Do you know how to build or re-build good credit?	0 = No, I do not know how to do this 1 = I do not have any credit cards or any debt so this is not a concern for me 2 = I know a little about this, but I need to learn more in order to take action to build or re-build my credit 3 = I understand how to build or re-build good credit and I have good credit or am taking action to build or improve my credit		
G.8.0	Outside of your farm or ranch business, do you have or have you had other earned income?	0 = No and skip to G.Z.1 2 = Yes and continue		
G.8.1	Is this income from a job or from another self-employment business?	0 = No 1 = Job/payroll 2 = Self employment or rental income		
G.Z.1	How important is it to you to learn more about how to predict and manage cash flow?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
G.Z.2	How important is it to you to learn more about different kinds of credit for different needs? This means learning about the difference between operating credit and credit for different kinds of asset purchases.	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
G.Z.3	How important is it to you to learn more about how to understand your loan statement, how your monthly payments affect your loan balance and how to pay off your debt more quickly?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		

			# Score	Letter Score
G.Z.4	How important is it to you to learn more about how to build or re-build good credit?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		

H. Business Plan, Insurance, Energy, and Other

This section evaluates your general business knowledge and your knowledge of a few specific USDA programs.

			# Score	Letter Score
H.1.0	Do you know how to create a business plan for your farm or ranch?	0 = No, I do not know how to 1 = I know what a business plan is, but I have not yet tried to do one for myself/or don't want to 2 = I sort of tried but didn't get very far or 2 = I do not need one and do not expect to need one 3 = I have done this, but I have questions and need help getting it right and understanding how to use it 4 = Yes, I have a written business plan that is meaningful and useful		
H.2.0	Do you have friends, family, or neighbors who help you as informal business advisors?	0 = No 2 = Yes		
H.2.1	Do you want additional mentorship?	0 = No 2 = Yes		
H.3.0	How satisfied are you with your business organization, paper work, time management etc.?	0 = I am a total mess and that's just how I am 1 = I am a total mess but I want to improve 2 = I am less of a mess than I used to be and I am taking specific actions to improve or would like help improving 3 = I do ok, and I am constantly improving 4 = My desk is mostly always clean, my records are mostly always current, I have good office work habits and good systems in place		
H.4.0	Have you taken any classes to help you improve your business skills?	0 = No 2 = Yes		
H.4.1	What kind of classes?	A = Basic bookkeeping / accounting B = General business/business planning C = College level course work D = Graduate level course work		

			# Score	Letter Score
H.5.0	Do you understand what crop insurance is and why you would purchase it?	0 = No, I do not understand this 1 = I understand insurance, but I don't understand crop insurance or how it applies to the business I want to start 2 = I understand why this is important, but I have not done it/can not afford it/do not want it/do not have enough information and understanding to make decisions at this time 3 = I do not think crop insurance is available for my type of operation or I plan to purchase crop insurance but I have questions and I might need help 4 = I know that crop insurance is not available for my type of operation or I plan to purchase crop insurance and I am confident I have the information and advisers I need to make the right decisions		
H.6.0	Do you understand what a general liability policy is and why you would have one for your farm or ranch?	0 = No, I do not understand this 1 = I understand insurance, but I don't understand how it applies to the business I want to start 2 = I understand why this is important, but I have not done it/can not afford it/do not want it/ do not have enough information and understanding to make decisions at this time 3 = I plan to purchase insurance for my farm or ranch business this year; I know I will have a lot of questions about what kind of insurance to buy and how much to buy, and I might need help finding the right insurance agent 4 = I have identified an insurance agent to work with and I feel confident I can get the advice I need to make the right decisions about what kind of insurance to buy and how much coverage to buy		
H.7.0	Do you understand what disability insurance is and why you would buy it?	0 = No, I do not understand this 1 = I understand insurance, but I don't understand disability insurance or how it applies to the business I want to start 2 = I understand why this is important, but I have not done it/can not afford it/do not want it/do not have enough information and understanding to make decisions at this time 3 = I plan to do this soon, but I have questions about what kind of insurance to buy and how much to buy, and I might need help finding the right insurance agent 4 = I have coverage already or I have identified an insurance agent to work with and I feel confident I can get the advice I need to make the right decisions about what kind of insurance to buy and how much coverage to buy		
H.8.0	Do you have a plan to cover the expense of a well failure, sudden and long term loss of a market, other major unexpected disruption?	0 = No 2 = Yes		
H.9.0	For landowners only: Are you aware of the REAP program for on-farm energy production?	0 = No 2 = Yes 2 = Yes and I have this or have used it		
H.10.0	Are you aware of the Value Added Producer Grant program to expand value-added activities?	0 = No 2 = Yes 2 = Yes and I have this or have used it		
H.11.0	Do you have a succession plan including a designated person who is	0 = No, I have not thought about this or I do not know what these things are 1 = No, but I have thought about this and I would like more		

			# Score	Letter Score
	authorized to take over your affairs if you are dead or incapacitated?	information to understand what to do 2 = I have a will and an estate plan, but I do not have a short term plan for a temporary successor if I am incapacitated, or I have a short term plan for a temporary successor but I do not have a will and an estate plan 3 = I have put some effort into creating a short term or a long term succession plan but I have not been able to do it all, I have questions, I do not know if I have done it right, I am stuck on some things, I need help 4 = Yes, I have a will as well as a succession plan including a designated person who is trained and authorized to take over my affairs if I am incapacitated or deceased		
H.12.0	Are there written operating procedures in your office to help the people in your office continue to run operations in the event you are temporarily or permanently incapacitated?	0 = No, I have not thought about this or I do not know what these things are. 1 = No, but I have thought about this and I would like more information to understand what to do. 2 = I have a will and an estate plan, but I do not have a short term plan for a temporary successor if I am incapacitated, or I have a short term plan for a temporary successor but I do not have a will and an estate plan. 3 = I have put some effort into creating a short term or a long term succession plan but I have not been able to do it all, I have questions, I do not know if I have done it right, I am stuck on some things, I need help. 4 = Yes, I have a will as well as a succession plan including a designated person who is trained and authorized to take over my affairs if I am incapacitated or deceased.		
H.Z.1	How important is it to you to learn more about how to create a business plan?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
H.Z.2	How important is it to you to learn more about different ways to manage your time and be more organized?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
H.Z.3	How important is it to you to learn more about different kinds of insurance and how to decide which insurance and how much insurance to buy?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
H.Z.4	How important is it to you to learn more about the USDA Value Added Producer Grant or REAP programs?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		
H.Z.5	How important is it to you to learn more about how to make a plan for your business and family if you are temporarily or permanently disabled or you are deceased?	A = Not important B = Somewhat important C = Important but not a priority D = Important E = Very important/high priority		

I. Personal Information

This information will help us to get in touch with you and will also help us to understand what sorts of educational programs and learning habits are most associated with success.

			# Score	Letter Score
Name:				
E-mail:				
Phone:				
Physical address:				
Best time and way to get in touch:				
I.1.0	Before starting your farm or ranch, what was your experience farming or ranching?	0 = None 1 = Gardening, informal apprenticeship, WWOOFing, etc. 2 = Farm internship or apprenticeship (6 months or more) 3 = Formal program to teach farming or ranching, and put name in data field if known 4 = Formal program plus > 6 months internship/apprenticeship 5 = Grew up farming/ranching or many years working on farms or ranches		
I.2.0	Before starting your farm or ranch, what was your experience managing a small business?	0 = None 1 = Observing others, working as a non-managerial employee 2 = Management position 3 = Formal program to teach business management 4 = Have owned and operated a successful small business before		
I.3.0	Do you use a computer to use to access information or store your business records?	0 = No 1 = I use my phone or a tablet but not a desktop or laptop 2 = Yes, I use a laptop or a desktop (as well as my phone)		
I.4.0	How do you get information about farming and farm business management?	0 = I don't know about this, I do not have a plan for this 1 = Friends & family 2 = Friends & family & neighbors/mentor farmers 3 = Friends, family, neighbors & also from the internet, (blogs, podcasts, websites, articles) or only from the internet 4 = Some or all of the prior sources and NRCS, FSA, Extension, membership organization, ongoing association with a training program or incubator, or other farm service providers 5 = All of the prior plus books, magazines, classes		
I.5.0	Are you a dues-paying member of an association that provides you with information and advocacy about legal and regulatory issues?	0 = No and go to 1.10.0 1 = Yes		
I.5.1	Which organizations do you belong to?	A = Farm Bureau B = Farmers Union C = Grange		

		D = National Young Farmers E = Other		
I.6.0	How likely are you to go to classes to learn more?	0 = I won't 1 = Maybe if it is free and convenient 2 = Maybe if it is cheap and convenient 3 = Likely if I could afford it and find the time 4 = Very likely, or I already do that or have done that		
I.7.0	How much would you value one on one technical assistance with topics we have discussed?	0 = Not much 1 = A bit, depends, not sure 2 = I would be interested in learning more 3 = I would probably want this 4 = I defiantly want this!		

J. Optional Demographic Data – Unscored, but reported to funders

This information helps programs to evaluate their ability to serve diverse audiences, and helps programs that serve diverse audiences to apply for and receive funding.

			# Score	Letter Score
J.1.0	M/F/N	A = Female B = Male C = Non-binary or other		
		However many in Salesforce we need to be able to export the data to three categories: M/F/other		
Race(s):				
		At least look at this in terms of USDA options to make it easier to merge data		
J.1.2	Year of birth:			
J.1.3	In what country were you born?			
J.1.4	Do you have official refugee status under the United States Refugee Admissions Program?	A = Yes B = No		
J.1.5	Do you have any disability?	A = Yes B = No		
J.2.0	Have you served in the US military?	A = Yes B = No		
J.2.1	Branch:			
J.2.2	Rank:			
J.2.3	Current status?	A = Active B = Discharged C = Retired		

			<i># Score</i>	<i>Letter Score</i>
J.2.4	Educational benefits?	A= Yes B =No		
J.2.5	Disability benefits?	A= Yes B =No		