

VERMONT AGRICULTURE VIABILITY COUNCIL
FINAL REPORT

Produced by the Vermont Council on Rural Development
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Appendices are available on line at:

www.sover.net/~VCRD

Compilation of Testimony from Agriculture Hearings scheduled for the Vermont Agriculture Viability Council: February – March, 2002

Summary of Studies on Vermont Agriculture: 1990 – 2002
Submitted by Cynthia Tokos

“Recommended Actions for Keeping Agriculture Viable”
Submitted by Allbee & Allbee, Inc.

Compilation of Notes from Presenters to Vermont Agriculture Viability Council Meetings

Executive Summary of the Recommendations to the Vermont Agriculture Viability Council: Vermont Department of Agriculture, Food & Markets
Submitted by Commissioner Leon Graves

Introduction

In November 2001, the Vermont Council on Rural Development (VCRD) established the Vermont Agriculture Viability Council (VAVC). VCRD's goal was to develop a "strategic plan" that would further the continuing evolution of Vermont's vital dairy industry and foster the continuing growth of Vermont's "diversified" agricultural enterprises.

VCRD charged the VAVC to develop a set of agricultural policy recommendations for Vermont's new Governor and Legislature that would focus the state's intellectual and financial resources on a course of action that would be both strategic and pragmatic. VAVC began with the premise that, while Vermont's intellectual resources are immense, its financial resources are relatively limited, especially at this time. The Council evaluated the costs and benefits of potential recommendations carefully, knowing that investments (of both policy and money) that contradict macroeconomic conditions or are not focused on Vermont's particular strengths will be of limited benefit.

While VAVC was ever mindful of "current events", particularly the national dairy recession afflicting Vermont's milk producers, it focused on what it believes to be "longer term" goals that will strengthen the competitive position of the state's farmers and marketers.

VAVC decided that a truly deliberative approach would require more than "just a few meetings" and that a new Governor and Legislature would, in early 2003, be confronted with the enduring challenge of agricultural policy. VAVC has therefore worked over the last twelve months to listen and learn, debate and decide the recommendations that it now offers.

VAVC recognized that many efforts to develop "blueprints" have been undertaken over the years. It determined that the most productive approach would therefore be to review past agricultural policy recommendations, solicit new ideas, critique both sets and, finally, recommend courses of action that look to the opportunities of the future, learn from the lessons of the past and acknowledge the realities of the present.

After consultations with Vermont's House and Senate Agriculture Committees, the Commissioner of Agriculture, and a diverse group of agricultural leaders, VCRD asked 17 people who represent the diversity of Vermont's agriculture and understand its strengths, weaknesses, opportunities, and threats to participate as members of the VAVC (see Member List on page 17). They were not chosen because they were affiliated with or represented any particular organization but because they are successful at what they have chosen to do. Half are active farmers whose farms are large and small in scale, whose practices are conventional and organic in nature, whose products are dairy and many things other than dairy; half are agricultural executives and policymakers whose businesses are rooted in the production and marketing of the produce of Vermont's farms. All share a commitment to Vermont's agricultural sector.

The work of the VAVC proceeded in four stages:

- I. VAVC commissioned and oversaw the development of a Vermont Agricultural Program Report. Produced by Allbee & Associates, this report catalogued state, federal, and non-profit farm programs in Vermont, documented duplications, over-lap,

and gaps between programs, evaluated the effectiveness of the most critical and analyzed market opportunities for the future.

- II. VAVC evaluated all of the major studies and proposals presented since 1990 whose stated goal was to promote farm viability in Vermont. The Council analyzed this compilation of recommendations for relevance, considered which recommendations still have merit but have not been implemented, and consolidated recommendations deemed worthy of further consideration.
- III. VAVC held a series of five agricultural hearings with farmers and concerned parties throughout Vermont to solicit ideas regarding the challenges and opportunities farmers face, to hear their success stories and their recommendations for public policy.
- IV. Through a series of presentations over the course of the year, VAVC gathered the perspectives and recommendations of farm commodity experts, marketers and agricultural policy experts on the challenges and opportunities before agriculture in Vermont.

Through these means, the VAVC ensured that diversity of thought would guide its deliberations and recommendations. On behalf of the VCRD, we are pleased to provide this set of strategic, practical policy recommendations for consideration by Governor Douglas, the General Assembly and Vermont's Congressional delegation this January, 2003.

The Role of the Vermont Council on Rural Development

VCRD chose to make agriculture one of its research priorities for 2002/2003. It invited the participants who became the VAVC, built the charge to the group, and committed itself to the delivery of a set of strategic recommendations to the Governor's Office, the General Assembly, Vermont's Congressional delegation and other interested parties. A VCRD Board Member chaired the committee while VCRD provided expert facilitation, produced and distributed reports and explained the committee's recommendations to state, federal and NGO policy makers and legislators.

VCRD is a non-profit organization dedicated to helping Vermonters and Vermont communities develop their capacity to create a prosperous and sustainable future through coordination, collaboration, and the effective use of public and private resources. VCRD is a dynamic partnership of federal, state, local, non-profit and private sectors. The work of the VCRD is non-partisan; its neutrality, along with its established reputation for community-based facilitation, put it in a unique position to sponsor and coordinate the VAVC.

The Challenge to Vermont Agriculture

Vermont is home to an array of agricultural businesses. Our dairy industry comprises approximately 1,450 farms and a constellation of large and small marketers of Vermont dairy products. Although our local industry is suffering the pain of a national dairy recession and is thus under considerable stress, it remains a competitive player in national dairy markets: Vermont's 2.7 billion pounds of milk production annually holds a relatively constant 1.6% national market share.

Our dairy industry remains the primary source of Vermont's agricultural products and revenues (85%) and maintains the Green Mountain State's relative abundance of "open" agricultural land.

Vermont also benefits from a wealth of farms that produce other food and fiber products. The production of "diversified" farm products has grown over the past twenty years as farmers have found new opportunities and as the state has recognized the need to encourage diversification of its agricultural production. Although this sector remains relatively small by comparison to the dairy sector, it continues to grow as farmers develop local and regional markets for "Vermont" farm products.

There is a critical relationship between these two "sectors" of our agricultural economy. Vermont's dairy industry continues to produce Vermont's "hallmark" farm products, generate the largest share of agricultural revenues, provide the majority of farm employment and sustain the infrastructure that is necessary for agricultural production. It is hard to exaggerate the importance of Vermont's dairy industry to its agricultural sector.

Vermont's "diversified" producers and marketers represent the discovery and development of new agricultural opportunities for this state, particularly for farms that cease to be dairy farms. While no "diversified" form of agriculture has yet demonstrated the capacity to generate the substantial revenues or farm the extensive land base of the dairy industry, Vermont's diversified farms offer opportunities for growth that the dairy industry may not be able to provide.

This said, agriculture in our state is at a pivotal juncture. While both our dairy and diversified sectors continue to succeed within their respective markets, competitive pressures are increasing at an accelerating rate and continue to challenge the profitability of our farms.

Some of these pressures are "macroeconomic" and largely beyond the control of Vermont's farmers and policymakers. Technological innovation (genetic progress and management improvements) in the dairy industry, for instance, continues to enable production per cow to grow at a rate faster than the growth of consumption, thereby weakening the price per hundredweight that farmers receive. In a similar way, production of diversified livestock and crops in other regions also affects local prices and limits profitable marketing.

Some of these pressures are "microeconomic", however, and can be magnified or countered by local policy decisions and financial investment. Vermont's regulatory culture increasingly threatens the necessary reinvestment of both equity and borrowed capital in Vermont's generally "old" farmsteads and complicates the adoption of competitive technologies.

Vermont's farms and agribusinesses are not unique: while of special importance to us, milk, maple syrup, honey, apples and other fruits, sweet corn, tomatoes and other vegetables, meat and eggs are produced, in abundance, in other regions of the United States and the world. Vermont's farmers compete within the context of a market economy whose "rules" require that they maintain a "competitive parity" with similar industries in other places and whose competitive standard is largely driven, both for producers and marketers, by the timely adoption of technological innovation and the timely entrance into profitable markets.

Vermont's dairy industry is primarily a producer of the raw commodity, milk. As such, it is subject to the typical market forces that drive the pricing and marketing of most commodities. Supply and demand nationally largely dictate prices received and costs paid by farmers locally: small surpluses

nationally depress prices locally while small shortages nationally swell prices locally. In neither case is Vermont (or any state) in a position to substantially manipulate the economic environment.

The primary challenge facing Vermont's dairy farmers is competitiveness. This challenge can, in turn, be further divided into two parts: the cost of producing milk on the farm and the opportunity to earn more than commodity prices for that milk. In the first case, continuous gains in productivity have been the hallmark of the American dairy industry since World War II. While these gains are somewhat related to the scale of operation, they are perhaps more closely correlated with the adoption of technology (physical and management) that improves productivity whatever the scale of operation. In the second case, the promotion of the consumption of fluid milk and the differentiation of "raw milk" into "value added products" have been the difficult but successful strategy to increase the raw product's value to the farmer.

Although costs vary widely, Vermont's dairy farmers have maintained their relative share of the national milk market for decades. Vermont's two largest cooperatives, Agrimark/Cabot and St. Albans Cooperative Creamery, have successfully added value to that portion of their farmers' raw milk that is sold in "commodity markets". These are not races that are won once and for all, however; rather, they are races that must be run and won each and every year.

Vermonters consume only 5% of what Vermont dairy farmers produce each year. The strategy for Vermont's dairy industry that will most likely foster success should therefore recognize that our market and our competition are regional and national in scope and that farm productivity and product differentiation will continue to be the deciding factors.

The competitive challenge for Vermont's "other than dairy" or "diversified" agricultural industry is similar but requires a different focus. Profit margins here are also driven by national markets (certainly for conventionally produced food and fiber and increasingly for organically grown products). While some producers may well choose to sell into the national arena, Vermont's diversified enterprises lack the historical and, to a degree, natural advantages that its dairy industry enjoys. The great advantage that these producers enjoy is the "Vermont brand" and the opportunity to sell into a local and, perhaps, regional market that will pay a premium for this brand. Vermont's maple industry has used this tool well for decades.

Vermonters consume far more than the state's "diversified" farms produce each year. While "food self-sufficiency" may be an unrealistic goal, a "buy local" strategy built upon the "Vermont brand" should increase the market share held by Vermont's diversified farmers.

While there will always be successful strategies that do not fit these two "molds", VAVC believes that Vermont's policy and financial investments in agriculture should focus on these general strategies in order to support the personal and financial investments that Vermont's capable farmers make daily to remain competitive and capture attractive markets.

For agriculture to be successful in the future, Vermont needs to understand the competitive pressures that its agriculture faces and craft policies that will support farm profitability. Although it may be difficult to achieve, Vermont needs to develop a consensus that allows farmers with large and small-scale farm businesses and conventional and organic marketing strategies to apply their respective entrepreneurial skills as they see fit. A statewide "vision" that precludes one or the other will diminish the viability of our diverse industry.

In sum, Vermont's policies and investments should be focused on the needs of producers and marketers to reduce costs of production and develop or capture high margin market opportunities. State and federal policies that impede the adoption of beneficial technologies or slow the entrance into new markets should be reviewed, and where possible, avoided.

Vermont's Business Environment for Agriculture

It is often said that agriculture is what makes Vermont such a "special place to be". Vermont's natural scenery is remarkable, but it is the juxtaposition of that natural beauty with the man-made agricultural landscape that distinguishes Vermont from other admittedly scenic states. Vermonters should not conclude that the state's dependence on agriculture for its self-image and tourist marketing focus will sustain our farms and their "way of life". That logic would put the cart before the horse. The only condition that will sustain Vermont's agricultural industry will be profitability. That profitability is particularly crucial to those counties and communities that are still largely dependent on farm and forest products (and the recreational opportunities that these assets make possible) for their employment.

Vermont has successfully displayed both state and federal leadership on farm policy regarding milk prices, environmental conservation, commodity diversification and farm product marketing. The Northeast Dairy Compact (now derailed) and the current federal Farm Bill's MILC program have substantially buffered the low farm milk prices that national market conditions have wrought. Vermont's farmland conservation program has ensured that a significant expanse of productive soils will be protected for potential agricultural use. The state's investment with the federal government has helped farmers make the necessary investment in management practices that meet environmental as well as agricultural goals.

Much of what Vermont has done successfully has been the result of a pragmatic focus on actions that enable Vermont farmers and marketers to maintain existing or develop new competitive advantages. VAVC believes that Vermont's policymakers should focus on a discreet set of policy initiatives that capitalize on Vermont's successful "brand" strategy while recognizing the competitive rules of the market economy within which Vermont's farmers must work.

To be successful, Vermont needs to encourage its farm and food product entrepreneurs to develop as diverse an array of agricultural business models as they can. The Vermont Department of Agriculture should have the resources to promote the growth of these farm and value-added enterprises. Vermont's policymakers should understand the consequences of their policies on Vermont's agricultural entrepreneurs before they are enacted rather than after; the margin for error for farmers today is slim.

To that end, VAVC offers a series of recommendations relating to agricultural policy in general, farm profitability, agricultural product marketing, farm transitions, and education.

With the turn of the millennium, it is time to take a long view of the state of agriculture in Vermont and to ponder its future. We hope that this report and its recommendations will contribute to that effort.

VERMONT AGRICULTURE VIABILITY COUNCIL

VISION

The VAVC envisions a future in which the people of the State of Vermont recognize that the health of our agricultural industry is of the highest priority to our communities and economy. Vermont farmers profitably produce and market a variety of wholesome foods and farm products and are the cornerstone of the rural economy. Vermont farms provide a livelihood to farm families and help maintain prosperous rural communities. Vermont's farm economy is vital, vigorous, adaptable, and diverse because its entrepreneurs respond to consumer demands and market opportunities with successful business models. Vermont foods and farm products earn a competitive edge in the marketplace because of the state's international reputation for environmental integrity and product quality.

VALUE STATEMENTS

- Vermont's agricultural industry deserves the commitment of coordinated leadership and adequate resources.
- Viable farms are the core of the Vermont working landscape.
- Communities and farmers recognize and support effective farm practices and principles of stewardship.
- Public education should explain about the value of purchasing local, safe, and healthy Vermont products.
- Farmers' access to educational opportunities is essential to the establishment, development, transfer, and sustainability of farms.
- A critical mass of agricultural soils is conserved ensuring a land base for farming into the future.

VERMONT AGRICULTURE VIABILITY COUNCIL

RECOMMENDATIONS

GOAL: Governmental Policy – Coordinate and Focus the Development of Agricultural Policy in Vermont.

Recommendation:

The General Assembly should establish a “Secretary of Agriculture” to lead the “Agency of Agriculture”.

The Legislature should act this session to effect this change.

Recommendation:

The Governor should appoint a “Council on Agriculture” to assist the Agency as it develops long-term vision, agricultural policy, and strategic goals for agriculture in Vermont.

- The Governor should establish the Council by Executive Order. The Council should represent the diversity of agriculture in the state but should not be so large as to be ineffective. Persons from the public and private sectors should be appointed. The Secretaries of Commerce and Natural Resources should be gubernatorial appointees to the Council.
- The Council should have a majority of farmers who will serve as representatives of farm sectors rather than organizations. Their selection should be based on their ability to understand policy issues and articulate solutions.

Recommendation:

The Senate Agriculture Committee should have equal standing with all other Senate committees.

Recommendation:

The Legislature should ensure that Vermont farmers continue to be able to choose business models and technologies that they believe will maximize their chances of success.

- The Legislature should not enact laws or permit regulations which interfere with a farmer's right to choose his or her business model (conventional or organic, large or small scale, e.g.) so long as a farm operation is in compliance with current state and federal regulations and follows accepted practices.
- Farmers should be responsible for implementing best practices under the regulatory oversight of the Vermont Department of Agriculture.
- The provision of choice for farmers' business models and technologies should recognize the need of organic farms to meet national organic standards.

Recommendation:

The Vermont Economic Progress Council (VEPC) should continue to develop its plan for the agricultural sector. In addition, VEPC tax credits should be systematically promoted to agricultural enterprises that meet its standards for investment.

Recommendation:

In order to remain competitive, Vermont must promote research and maintain its research infrastructure. Toward that end, the Legislature should annually review the research plans and accomplishments of the Vermont Agriculture Experiment Station at the University of Vermont. The Experiment Station's research should be consistent with the current needs of the State but also reflect future opportunities.

Recommendation:

The Legislature should contract for an economic evaluation, including economic impact modeling, of the role and value of agriculture in the Vermont economy. (Estimated cost \$15,000)

Recommendation:

The Governor should appoint a representative from the agricultural community to his Council of Economic Advisors.

GOAL: Farm Profitability – Improve the Profitability of Vermont Farms by Lowering Costs, Supporting Good Management, and Avoiding the Imposition of Barriers to Farm Development and Growth

Recommendation:

The Legislature should establish a “Farm Viability Enhancement Program” (cost estimated to be \$500,000 annually).

- The Farm Viability Enhancement Program should offer farmers the opportunity and tools to improve profitability by providing targeted, technical assistance toward the development and implementation of good business models for those who want to continue what they now do and to those who want to diversify or change commodities altogether.
- The program should enable farmers to develop a comprehensive business plan with assistance from a diverse, interdisciplinary team.
- The Vermont Department of Agriculture should coordinate future agriculture viability efforts with the various educational and technical information providers.

Recommendation:

The Legislature should continue to assess the effect of State tax policy on farm profitability.

- Agricultural lands in the Current Use Program should be exempted from the Education Property Tax (cost and benefit estimated \$2,000,000 annually).
- Special purpose farm buildings should be tax exempt (an estimated \$930,000 benefit to VT farms).
- Capital gains taxes should be eliminated on farm assets sold to another farmer or to a new farmer (“farmer” as defined by Current Use).

Recommendation:

The Legislature should ensure that Vermont farmland conservation dollars are spent on the conservation of working farms.

Recommendation:

Vermont's Congressional delegation should seek opportunities to reauthorize the Northeast Dairy Compact (cost to the state estimated to be \$100,000 annually).

In the absence of the Northeast Dairy Compact, the Milk Income Loss Contract Program (MILC) should be continued but amended to reflect the needs of Vermont's multiple-family dairy farms.

Recommendation:

In order to establish a price mechanism formula that reflects the dairy farmer's cost of production: the Vermont's Congressional delegation should petition USDA to hold hearings to amend the Federal Milk Market Orders in order to incorporate a monthly adjustor for the establishment of Class I and II prices that reflect the regional cost of production.

Recommendation:

Vermont's Congressional delegation should continue to encourage USDA to use its programs and resources (such as the Dairy Export Incentive Program, Foreign Agriculture Services's Market Access Program and CCC purchases) to facilitate greater returns to producers.

Recommendation:

Vermont's Congressional delegation should continue to urge the U.S. Department of Justice to investigate proposals that would unduly concentrate the processing and marketing of milk and dairy products and should ask it to expand its investigation to include effects on the returns to dairy farmers.

Recommendation:

In order to improve the regulatory climate for agricultural businesses in Vermont, the Department of Agriculture should investigate regulations for the processing and marketing of agricultural products based on risk and scale.

Recommendation:

It is critical that the State maintain regulations that are cost effective and limit the potential for the initiation of nuisance suits. Toward that end, the Legislature should quantify the effect of proposed regulations on the profitability of agriculture

before enactment. The Legislature should not enact laws that will affect agricultural profitability without a clear understanding of any effects.

Recommendation:

The Department of Agriculture must also “push back” and investigate with the EPA and other federal regulators its options to conduct functional versus regulatory reviews.

GOAL: Marketing – Increase the Sales and Value of Vermont Products through a Comprehensive, Coordinated Marketing Strategy Built upon the “Vermont Brand”

Recommendation:

The Department of Agriculture should plan and institute a “Buy Local” Initiative to promote the purchase and production of Vermont Farm Products by Vermonters and visitors within the State (expected costs included in DOA marketing funds).

This plan should include input from and strategic support for 6 key systems:

- Community Supported Agriculture (CSA)
- Institutional Purchasing
- On-Farm Sales
- Restaurant Sales
- Farmers Markets
- Local Groceries

Recommendation:

The Legislature should identify a sustainable funding source and provide consistent and adequate funding to the Department of Agriculture for agricultural development and marketing (expected annual cost, \$250,000).

The Legislature should provide the Department of Agriculture the funding necessary to allow the Agricultural Resource Center (ARC) to expand its services to Vermont’s diversified sectors (expected annual cost, \$50,000).

Commodity groups that seek state promotional funds should match those funds.

Recommendation:

Vermont’s governmental agencies should coordinate their marketing funds to provide the strongest leverage of the “Vermont brand” for agricultural products.

MAPS (Marketing and Promotion Team), currently chaired by the Commissioner of Tourism and Marketing, should be chaired by the Secretary of Administration. The State’s agencies should submit marketing plans that include measurable goals.

GOAL: Agricultural Transitions – Encourage Vermont Agricultural Enterprises to Change to Meet New Market Opportunities

Recommendation:

The Department of Agriculture should seek federal funding to build a Vermont value-added agriculture fund to provide jump-start grants supporting value-added processing in Vermont, then systematically match grants with loan funds from the private sector, VEDA and other sources. (Approximate Federal Request: \$400,000)

- Disbursements of these funds would be dependent on strong business plans and may, in some cases, connect with plans developed through the Farm Viability Enhancement Program.

Recommendation:

The Legislature should authorize and fund a guarantee program to encourage private sector financing of value-added processing in the State.

Recommendation:

The Legislature should authorize VEDA to loan capital at low rates for investments in farms and value-added agricultural enterprises.

- The Legislature should support the capacity of VEDA's Vermont Agriculture Credit Corporation (VACC) to subsidize farm loans at same level as industrial loans.
- In addition, the Legislature should support the creation at VEDA of a Venture/Mezzanine Capital Fund to invest in agricultural and commercial enterprises that do not currently meet the underwriting criteria for VACC and VEDA direct lending.

Recommendation:

The Vermont Congressional delegation should seek to amend appropriate enabling legislation in order to allow the Farm Credit System and commercial lenders to make equity investments in value-added agriculture.

GOAL: Education – Prepare a New Generation of Farmers and Consumers
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Recommendation:

The University of Vermont, the Vermont Agricultural Experiment Station and the Extension System should collaborate, wherever possible, with other New England and New York institutions of higher education – in particular, Cornell University – in the creation and execution of educational opportunities for farmers and food product marketers.

Recommendation:

The “2+2” farm program scholarship funding should be moved from the Vermont Department of Agriculture to the Vermont Student Assistance Corporation with established criteria to support Vermont students at UVM or VTC. The Vermont Extension Service should ensure the coordination of “2+2” with the financial support for beginning farmers available through the Vermont Department of Agriculture, the Farm Service Agency and VACC.

Recommendation:

The Departments of Agriculture, Education and Labor should undertake an assessment of agricultural workforce needs and the development of programs to support Vermont’s agricultural industry in the state’s vocational system.

Recommendation:

The Department of Education should revise the science, math and technology sections of the Vermont Framework of Standards to include Vermont agriculture as an integral part of the natural resource economy. This revision would ensure the integration of agriculture into pre-K through 12 school curriculums.

Recommendation:

The Department of Education should draft and recommend a model food policy for local school districts to consider. Such a policy would provide guidelines for nutrition education, farm and gardening activities, food served in schools, and the purchasing of local farm products for school food services.

Recommendation:

The Vermont Department of Education should develop and distribute a “best practices” model to encourage the use of Vermont agricultural products in school food programs. This model should be shared throughout the state through the Vermont Department of Education’s Child Nutrition Programs and also the local schools’ food advisory councils.

Vermont Agriculture Viability Council

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The VAVC is built upon the efforts of the VCRD Working Landscape Committee, who conceived the VAVC, took input from farmers and policy leaders to develop the charge, and established the process that is now complete. This Working Landscape Committee is comprised of: Alex Aldrich, Vermont Arts Council (Chair); Tom Berry, Senator Jeffords Office; Barbara Grimes, Burlington Electric Department; Steven Kerr, Farm Service Agency; Jolinda LaClair, USDA Rural Development; Bob Paquin, Senator Leahy's Office; Fred Schmidt, UVM Center for Rural Studies; Ed Stretch, Gilman Housing Trust; David Tucker, Office of Economic Opportunity; and Jonathan Wood, Bell-Gates Lumber.

Farmers and concerned citizens shared their perspectives in public forums across the state, and organizations responded to surveys documenting their services, perceptions and recommendations. Over the course of 2002, a number of policy leaders, marketers, and commodity organizations developed presentations to deepen the understanding of VAVC members on the array of issues to be considered; their testimony can be found at www.sover.net/~VCRD. We highly value the contributions of all these partners in support of the future of agriculture in Vermont.

We are grateful to the following contributors who made significant investments of financial or in-kind resources to the process:

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