



## Curriculum for online “Agritourism Intensive” class – San Luis Obispo Co. & region

This course will introduce the student to a range of opportunities for diversifying a working farm or ranch by providing enjoyment and education to visitors for profit. Students will participate in individual exercises and share their work during class discussions, and will have homework assignments to complete between the class sessions. The homework will include completing assessment worksheets in cooperation with family or business partners and writing first drafts of parts of their own business plans. Class instructors will provide each participant with individual feedback on all assignments turned in. No educational credit will be given for this course.

The participants will be encouraged to (but not required to) participate in online group discussions about the classes, readings and individual planning work.

**The SLO region Agritourism Intensive classes are open to farmers, ranchers and others involved in or planning for agritourism in San Luis Obispo, Monterey and Santa Barbara Counties. The format of the class is a series of 6 participatory 2-hour zoom meetings, every Tuesday beginning January 12, 2021 and ending February 16, 2021. Each session will be 9 a.m. to 11:00 a.m. Shared zoom participation will be available at the SLO Farm Bureau office for those with poor internet access.**

### Session #1, Tuesday January 12, 2021:

- 9:00 a.m. Overview of the class series and zoom logistics
- 9:10– 9:20 Short introductions by all participants
- 9:20- 10:10 Successes in agritourism – Three experienced local agritourism operators tell their stories, successes and start-up challenges, followed by Q&A
  - *Chanda Brown, Marketing Director, Cass Winery, Paso Robles*
  - *Tina Ballantyne, Giving Tree Family Farm*
  - *Raven and Jake Lukehart, Avila Valley Barn*
- 10:10– 10:35 Assessing your farm or ranch and community for agritourism potential
  - *Penny Leff, UC SAREP Agritourism Coordinator*
  - Assessment worksheets for participants to download and complete with family or partners as homework.
- 10:35 – 10:55 Breakout rooms for small group discussions among participants to share preliminary ideas, assessments and challenges
- 10:50 – 11:00 Wrap-up, Homework discussion, Online evaluation survey

### Session #2, Tuesday January 19, 2021 :

- 9:00 – 9:10 Welcome, brief overview of class series, zoom format
- 9:10 – 10:00 Introduction to business planning – mission, objectives, business concept
  - *Kurt Friedman, SLO Hothouse, SBDC*
- 10:00 – 10:50 Navigating the permitting and regulatory process, with Q&A
  - *Dan Klemann, Santa Barbara County Long Range Planning Division*
  - *John Parke, Santa Barbara County Planning Commission*
  - *Denny Brewer, SLO Environmental Health Services*
- 10:50 – 11:00 Wrap up, online evaluation survey, homework discussion

**Homework** – to be completed by beginning of next class:

- ❖ reading in text and supplemental reading
- ❖ Complete assessment worksheets of participant's own farm or ranch for agritourism potential, involving family members and partners in the process.
- ❖ Begin evaluation of the potential for several current or possible agritourism activities on participant's farm or ranch, including who would be partners/collaborators.

**Session #3, Tuesday January 26:**

- 9:00 – 9:10 Welcome, brief overview, zoom format
- 9:10 – 9:50 Virtual Field trip! Recorded video with narration about facilities, infrastructure needs, staffing, etc. followed by live Q&A
  - *Karen Tallent, Groves on 41*
- 9:50 – 10: 40 breakout groups led by experienced operators of different agritourism activities
  - *Farm stand, farm shop – Raven & Jake Lukehart, Avila Valley Barn*
  - *Winery activities, tasting rooms – Chanda Brown, Cass Winery*
  - *U-Pick, Farm tours, education programs – Karen Tallent, Groves on 41*
  - *Farm stay, guest ranch, Ranch, rangeland activities – Kelly Work, Work Ranch*
  - *Events, festivals, dinners – Lynette Sonne, FARMstead ED*
- 10:40 – 11:00 Wrap up, group discussion, online evaluation poll, homework discussion

**Homework** – can be turned in to instructor by email for review and feedback:

- ❖ Complete first draft of “one page business plan”: mission statement, business concept, goals and objectives.

**Session #4, Tuesday February 2, 2021**

- 9:00 – 9:10 Welcome, brief overview of class series, zoom format
- 9:10 – 9:30 Breakout rooms w/small groups – Emergency preparedness planning exercise
- 9:30 – 10:00 Full group report back from small groups, with instructor sharing emergency preparedness planning resources ([Agritourismready](#))
- 10:00 – 10:50 Legal liability and risk management strategies
  - Introduction to land-owner liability, risk management - *Penny Leff, UC SAREP*
  - Insurance for agritourism – *Insurance Company representative (TBD)*
  - Share handouts, checklists and web site for safety & risk management ([safe agritourism](#))
- 10:50 – 11:00 Wrap up, online evaluation survey, homework discussion

**Homework** – can be turned in to instructor by email for review and feedback:

- ❖ Complete risk assessment checklists for farm, ranch or agritourism operation
- ❖ Consult with insurance agent, county planning department, and/or experienced agritourism operator about business concept

### Session #5, Tuesday February 9, 2021:

- 9:00 – 9:10 Welcome, brief overview of class series, zoom format
- 9:10 – 9:40 Budgeting & cash flow – *Cecelia Lobdill, SLO Hothouse, Cal Poly SBDC*
- 9:40 - 9:55 Overview of financing options – *speaker TBD*
- 9:55 – 10:30 Effective websites, social media and marketing strategies for agritourism
  - *Jennifer Bravo, Paso Robles Wine Country Association*
- 10:30-10:55 Facilitated full group discussion, Q&A on planning so far and challenges encountered, potential for advocacy
- 10:55 – 11:00 Wrap up, online evaluation survey, homework discussion

### Session #6, Tuesday February 16, 2021:

- 9:00 – 9:10 Welcome, brief overview of class series, zoom format
- 9:10 – 9:40 Introduction to the tourism community, Q&A
  - *Annie Frew, Visit SLO CAL*
- 9:40 – 10:10 Creating a marketing plan
  - *Kristin Mehiel, SLO Hothouse, Cal Poly SBDC*
- 10:10 – 10:30 Individual exercise – create 6-month action plan
- 10:30 – 10:55 Marketing the community/agritourism associations and other collaborations
  - *Lynette Sonne, FARMstead ED and Joel Peterson, Paso Robles Wine County Association*
- 10:55 – 11:00 Wrap up, live evaluation form or online evaluation poll, thanks to team, funder

**Information:** Penny Leff, [paleff@ucanr.edu](mailto:paleff@ucanr.edu), 530-902-9763 (cell)

**This material is based upon work supported by USDA/NIFA under Award Number 2018-70027-28587.**



WESTERN  
EXTENSION  
RISK  
MANAGEMENT  
EDUCATION



United States Department of Agriculture  
National Institute of Food and Agriculture

