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## Evaluation Checklists for Agritourism and Direct Marketing Operations: Farmer and Extension Resources

Michelle Infante-Casella  
*Rutgers University*

William Bamka  
*Rutgers University*

Stepehn Komar  
*Rutgers University*

Meredith Melendez  
*Rutgers University*

Meredith Melendez  
*Rutgers University*

*See next page for additional authors*



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### Authors

Michelle Infante-Casella, William Bamka, Stepehn Komar, Meredith Melendez, Meredith Melendez, and Lucas Marxen

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### Abstract

The Rutgers Agritourism Training Team created a series of checklists designed for agritourism and direct marketing operators as part of an educational curriculum. Checklists were specifically crafted for farmer self-assessment or for evaluation in cooperation with Extension professionals. A primary training goal was to aid farmers with identifying operational improvements and adopting best practices in the areas of farm safety and liability management. Checklist topics included general farm safety conditions, animal safety protocols, emergency response procedures, liability management, employee training and management, food safety, and parking and traffic management. The ultimate goal was to improve farm visitor safety.

**Keywords:** [agritourism](#), [checklists](#), [farm management](#), [self-assessment](#)

### **Michelle Infante-Casella**

Agricultural Agent and Associate Professor  
Rutgers New Jersey Agricultural Experiment Station, Cooperative Extension  
Clayton, New Jersey  
[minfante@njaes.rutgers.edu](mailto:minfante@njaes.rutgers.edu)

### **William Bamka**

Agricultural Agent and Associate Professor  
Rutgers New Jersey Agricultural Experiment Station, Cooperative Extension  
Westampton, New Jersey  
[bamka@njaes.rutgers.edu](mailto:bamka@njaes.rutgers.edu)

### **Stephen Komar**

Agricultural Agent and Associate Professor  
Rutgers New Jersey Agricultural Experiment Station, Cooperative Extension  
Newton, New Jersey  
[komar@njaes.rutgers.edu](mailto:komar@njaes.rutgers.edu)

### **Meredith Melendez**

Agricultural Agent and Assistant Professor  
Rutgers New Jersey Agricultural Experiment Station, Cooperative Extension  
Trenton, New Jersey  
[melendez@njaes.rutgers.edu](mailto:melendez@njaes.rutgers.edu)

### **Brian Schilling**

Extension Specialist in Agricultural Policy and Associate Professor  
Rutgers New Jersey Agricultural Experiment Station  
New Brunswick, New Jersey  
[schilling@njaes.rutgers.edu](mailto:schilling@njaes.rutgers.edu)

### **Lucas Marxen**

Assistant Director of Research Technology  
Rutgers Office of Research Analytics  
New Brunswick, New Jersey  
[lmarxen@njaes.rutgers.edu](mailto:lmarxen@njaes.rutgers.edu)

## Introduction

Recent censuses of agriculture document continuing growth in agritourism and direct marketing, particularly in regions proximate to urban centers (U.S. Department of Agriculture, National Agricultural Statistics Service, 2014). Inviting the public to enjoy farm-based educational or recreational activities presents opportunities for many farmers to expand income, diversify markets, stabilize seasonal income fluctuations, create employment opportunities, and bolster direct marketing. However, expanding farm visitations presents new challenges to producers, especially in the areas of farm safety and liability management. Several farm safety issues, including cases of zoonotic disease transmission and hayride accidents, have attracted significant media coverage in recent years as well as the attention of safety advocates and legal professionals (Schilling, Bamka, Infante-Casella, & Komar, 2017).

Providing educational resources for farmers engaged in agritourism and direct marketing activities can be a challenge for Extension professionals because the industry is continually undergoing rapid development. At the same time, the breadth of technical assistance and dedicated Extension programming in the area of agritourism risk management is often limited. As part of a professional development project funded by a Northeast Sustainable Agriculture Research and Extension grant, our team created a series of farm evaluation checklists to help Extension personnel, agricultural service providers, and community development specialists provide practical advice, in a user-friendly format, on how to prepare farms for the safe accommodation of farm visitors and guidance on proactive liability management strategies.

## Self-Evaluation Tools for Agritourism Operators and Direct Marketers

An impartial view such as that provided by an Extension professional, emergency responder, or insurance provider can assist farm operators in gaining new perspectives or identifying opportunities for operational improvements that otherwise may not be evident to the operator amid the demands of everyday operations. This reality was borne out in a study conducted by Curtis, Cowee, Havercamp, Morris, and Gatzke (2008), in which evaluative assessments conducted with farmers and local chefs revealed that both groups lacked appropriate information concerning production possibilities, market needs, and customer preferences. In a similar spirit, Jablonski, O'Hara, Thilmany-McFadden, and Tropp (2016) developed a tool kit to aid Extension educators, community development professionals, and other stakeholders in conducting more rigorous evaluations of food system efforts in their communities.

A foundational element of our team's programming is educational outreach to farmers regarding the implementation of strategies and best management practices for creating a safer environment for farm visitors and managing the risks and legal liability to farm operators that accompany farm visitors. A common legal principle is that persons visiting a farm or other business to engage in commerce are owed the highest duty of care (i.e., a reasonable level of care on the part of the business owner and/or operator to protect the safety and well-being of farm visitors) (Schilling et al., 2017). Failure to meet this duty of care could result in a finding of farmer negligence if a visitor is injured, and compensatory and punitive damages may be awarded to an injured guest.

## Checklist Development

We developed a series of six farm evaluation checklists to assist farmers engaged in agritourism and direct marketing. The checklists facilitate critical evaluation of important aspects of farm operations and convey

actionable guidance on recommended best management practices in the areas of

- general farm safety,
- animal safety procedures,
- emergency response and liability management strategies,
- employee training and management,
- food safety, and
- parking and traffic management.

The checklists embody several core programming principles:

- Keeping farm visitors safe must be a nonnegotiable business priority.
- Efforts should be made to address farm safety risks through comprehensive farm safety and risk management planning.
- Farm safety risks can never be fully eliminated. Accidents will happen, and lawsuits against farms may result; therefore, protecting personal and business assets is a necessary risk management strategy.
- Employees need to be properly trained and held accountable to maintain a safe environment for farm visitors and execute emergency response procedures when necessary.
- Efforts to identify and mitigate possible farm hazards should be documented.
- Anyone engaged in agritourism/direct marketing, or thinking of developing such an enterprise, should consult with appropriate legal and insurance professionals.

Each checklist allows an evaluator or a farmer to note whether a recommended farm management practice or condition is present and prioritize action items to address risk management concerns, operational deficiencies, or opportunities for business improvements. The evaluation checklists may also serve as documentation of a farm's efforts to maintain a safe environment for visitors.

Designed to be practical and easy to use, the checklists are used routinely by members of our team during farm SWOT (strengths, weaknesses, opportunities, and threats) assessments. The tools are also made available directly to farmers through industry meetings and in-person consultations and at our program website (<http://agritourism.rutgers.edu/training/>).

Evaluation checklists have been made available to 690 Extension educators, agency staff, and other agricultural service professionals and 760 farmers participating in 27 workshops, classroom-style trainings, webinars, and small-group farm assessments throughout the northeastern United States. Team members also have presented these resources to national audiences at meetings of the National Association of County Agricultural Agents and the National Association of Community Development Extension Professionals and at the National Extension

Tourism Conference and the National Small Farms Conference.

Findings from project evaluation surveys indicate that during the 2014-to-2016 period alone, 24 agricultural service providers disseminated the checklist information/materials to more than 1,600 farmers. Documented farm-level changes include the following examples: More than 200 farmers improved farm safety with routine farm safety inspections; 190 farmers made efforts to better manage liability through, for example, accident response forms, indemnification waivers, and improved signage; and more than 120 farms adopted new-employee training procedures.

## Conclusions

Each agritourism or direct marketing operation has its own set of unique conditions. We developed a checklist series to help farmers step beyond everyday management pressures and identify areas for operational improvement, particularly related to farm safety issues and liability exposure. Elimination of farm-based risks is unrealistic. However, employing a comprehensive strategy to assess farm safety and risk management can help create a safer environment, foster a more enjoyable customer experience, and reduce liability exposure.

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