On-Farm Resource Team Guidelines

These are the guidelines for the 2026-2027 On-Farm Resource Team programs. ***Farms must have 35 or more lactating cows or dairy heifer raising operation on their facility dairy heifer raising operations with more than 100 dairy heifers to apply for a grant.*** Any questions regarding any of the points below should be referred to Melissa Anderson at 717-788-0296 or email: manderson@centerfordairyexcellence.org.

1. *What are the funding levels for 2026-2027 grants? (Grant period is July 1, 2026 – June 30, 2027)*
    - **Transition Team:** covers up to $4,000, minimum requirements must be met to get reimbursement. May only receive transition funding for 2 consecutive years for same transition.
    - **Transformation Team:** covers up to $4,000, minimum requirements must be met to get reimbursement. May only receive transformation funding for 2 consecutive years for same project. Grant requests will only be approved for planning purposes, not compliance. ***Manure storage facility improvements do not qualify as eligible Transformation Team projects. Please contact your local conservation district to receive more information on funding resources.***

2. *What are some of the **basic guidelines** for a team meeting?*
    - The meeting (suggested 90 minutes) will begin and end on time.
    - Team members have been selected as trusted advisors of the farming operation and for that reason will be expected to contribute for their experience, enter into a positive discussion, and seek future beneficial direction for the operation.
    - Members of the team must be considerate of sensitive information and regard confidentiality as a high priority.
    - Everyone on the team is expected to contribute to the discussion. No single person will dominate the overall meeting.
    - Discussion and ideas that become part of the meeting but are not time sensitive and critical to the pre-meeting agenda should be placed on hold for a future meeting agenda and addressed in meeting notes. (See agenda template)
    - Team members agree to complete assigned tasks such as developing cash flow projects, researching additional options and opportunities.

3. *What does a **typical agenda** look like for a team meeting? (Agenda template attached)*
    - Welcome, introductions, family/partnership news, challenges
    - Review of the previous meetings notes
    - Reporting from assigned tasks
    - Updates: herd performance, crops, other
    - Financials: cash flow, balance sheet, other
    - Roundtable discussion on the various areas of the operation that can be addressed by the team
    - Review action items, assigned tasks and set next meeting date, time, place

4. *Reimbursement Requirements:*
    - Meeting notes must be submitted with expenses for the expenses to be reimbursed (See Team Meeting Agenda Template).
    - Expenses will be reimbursed to producer only.
    - Producer agrees to completing a survey at the end of the grant funding period.
    - Invoices for each of the expenses must be submitted **June 30, 2027**.
    - Meeting notes, invoices/expenses, and expense form to be sent to: Center for Dairy Excellence, Attn: Melissa Anderson, 1140 Mountain View Rd., Shermans Dale, PA 17090.
    - For questions on reimbursement, please contact Melissa Anderson at 717-788-0296 or email: manderson@centerfordairyexcellence.org

5. *What expenses are considered to be **eligible team expenses** for **reimbursement**?*
    - **Team member time**: The consultant's time may be in-person, one to one meetings or consultation via email or phone.

- **Team member mileage**: Consultant travel to the team meeting, driver expenses for Plain Sect, team member travel to other farm locations within the state of Pennsylvania (recommendation to travel to the site should be reflected in the meeting notes)
- **Producer registration** for educational conference, workshops, meetings, and training:
    - Succession planning workshops, AgBiz Masters, Farmene, QuickBooks, Start-up cost associated with DHIA, etc. (recommendation to attend/enroll in these educational events should be reflected in the meeting notes)
- **Feasibility studies, cash flow analysis**, **business planning** to explore expansion or modernization
- **Site survey, permit development and permitting fees**, if all other questions have been answered.
- **Attorney or accounting fees** associated with farm transition
- **Discovery related costs** *as **recommended by team** to identify solutions or address bottlenecks:*
    - Culturing to identify bacteria causing high SCC or mastitis, testing to identify feeding or water quality issues, stray voltage testing
    - One-time only report for DHIA, PC Dart, SPR etc. for baseline determination
- **Request for reimbursement for a unique team expense should be forwarded to Melissa Anderson with explanation for approval.**

6. *The following list of **ineligible team expenses for reimbursement** is **not an all-inclusive listing**. **These expenses incurred may be applied to farm match if they are recommended by team and documented in meeting notes.** Please contact the CDE if you have a question about a potential ineligible expense and farm match under the On-Farm Resource Teams programs:*
    - Consultant expenses to attend educational conference, workshops, meetings, and training.
    - Software purchase, computer, and printer hardware, monthly or annual internet connection.
    - Travel:
        - Producer travel to annual producer events for the general public such as but not limited to (Keystone Farm Show, Ag Progress Days, PA Farm Show, etc.).
        - Air flights.
        - Travel expenses outside of Pennsylvania.
    - Routine DHIA testing, commodities, soil and manure testing and accounting fees to complete yearly taxes.
    - Equipment & supplies
    - Determining price comparisons between competing entities (engineering firms, Nutrient Management Planners, etc.)
    - Pre-payment of feasibility studies, cash flow development, etc. unless approved by Melissa Anderson.
    - Tax preparation

7. *May I have multiple teams in a fiscal year?*
    - No, only one type of On-Farm Resource Team is available per fiscal year from the CDE. The type of team depends on your need and best fit for your current situation.

8. ***Additional tools & resources are available on our website.*** *https://www.centerfordairyexcellence.org/grants*