

AGRITOURISM ACTION PLAN

EVALUATING IF AGRITOURISM IS RIGHT FOR YOU

Section 1: Self-Assessment

There are seven sections to your Action Plan. Each section is a fillable PDF form so you can type directly into the document and save the file to your computer to access later. Or if you prefer, you can save and print the file and then fill it in by hand.

This first section of your Action Plan gives you an opportunity to assess how you feel about taking up the challenge of running an agricultural tourism business. The purpose of this activity is to help you answer the question: Is agritourism a good fit for you, your farm and your community?

Instructions: For each statement below, check the box that indicates whether or not you agree with the statement. If you are not sure, check “maybe”. You may save multiple copies of this assessment if you have farm team members that would benefit from this exercise.

	Yes	No	Maybe
I am prepared to invest substantial time in planning and operating a new enterprise.			
The idea of taking on a new agritourism venture excites me.			
My farm team is committed to starting and operating an agritourism enterprise.			
My farm or ranch location is fairly easy to find or could be with proper signs and directions.			
I think my community would support my agritourism business.			
I like meeting and working with all types of people.			
I would enjoy having more people visit my farm or ranch.			
I would like to share my farming or ranching practices with the public.			
My family doesn't mind losing some privacy on our property.			
I can be patient to the needs of visitors.			

Continued	Yes	No	Maybe
I am comfortable being around and responsible for groups of people including children.			
I am a good communicator and enjoy talking with people.			
I am comfortable with assessing and managing risk.			
My farm or ranch operation will be able to survive financially if this new enterprise does not generate a profit for a couple years.			
I am willing to learn about and work through permitting and licensing requirements with local and state agencies.			

If you have answered “No” to most of these statements, agritourism might not be a good fit unless you have a committed team member that balances out some of these skills. If your answers are mostly “Yes” or “Maybe” then you are well suited to continue exploring an agricultural tourism activity for your farm/ranch business.

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Section 2: Evaluating Different Types of Agritourism Activities

Agricultural tourism is a way to promote the sale of your farm products and provide meaningful experiences that customers may be willing to pay for. In this section of your Action Plan, you will evaluate several different types of agricultural tourism with the goal of determining the activity (or activities) that fit best with your current farm/ranch business and your long-term personal and business goals.

Instructions: For each question below write brief answers to help you document the products you have to sell and the agritourism activities that are of most interest to you. Be sure to write at least one next step you need to take to either complete this form or move your idea forward.

1. Products

First, identify which of your products have the greatest potential for direct sales to customers. Make a complete list of all your farm/ranch products that you want to sell direct and describe if you think any may need further processing, packaging or labeling.

What products do I have to sell direct to customers?

Are there products that need to be processed, packaged or labeled in order to sell directly to consumers or add value?



2. Brainstorming agritourism activities

Which agricultural tourism activities would fit best with your current farm/ranch business? Fill out the table below to help clarify your reasons for pursuing that activity. We provide space in the table for you to evaluate several different options. If you have just one in mind, you can list just that one.

Agritourism Activity	Why do I want to add this activity to my farm/ranch business model? How does it support my business goals? Will my community support this activity?

If I were to choose one agritourism activity to start with, which would it be and why?

What benefits do you see this agritourism activity providing your farm/ranch business and your community?

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Section 3: Agricultural Tourism as Part of Your Whole Farm Business

It is important to think about how agritourism activities fits into your farm or ranch business plan. In this section of your action plan, you will evaluate how agritourism fits within your current goals, resources and infrastructure.

Instructions: Work through the sections below. Do not feel that you have to complete this form all at one time. Your goals are likely to change as your business does so think of them as a continual work in progress.

1. Goals

List the personal and business goals that are inspiring you to develop your agritourism business.

Business Goals	Personal Goals
<i>Example: Sell more vegetables at the farm to take the place of our lowest profiting farmer market.</i>	<i>Spend more time on farm instead of hauling to multiple farmers markets.</i>

*Goals could be financial, employee retainment, hiring an additional family member, or attracting more customers. Personal goals might include things like family, work-life balance, health and well-being, and farm succession.

How might your agritourism activities help you achieve your goals?

2. Integration with Your Whole Farm Business

The success of an agritourism enterprise hinges on how well it compliments your whole farm business, your community support and whether you and your farm team are up for a new venture. Indicate your response to the following statements to assess how well agritourism fits within your current farm business.

	Yes	No	Maybe	If not me, who?
I know how the agricultural tourism activity directly impacts the promotion and sale of my farm products.				
Members of my farm team agree with being open to the public. Seasonally or year-round?				
I will need additional staffing seasonally or year-round.				
I can easily attract customers to my property.				
I can connect and network with my neighbors and community.				
I have the financial capacity to implement the activity.				
I have the supervisory skills to manage an agritourism business.				
I have the marketing/sales skills to manage my agritourism business.				
I know where to go for help in evaluating the legal requirements of my agritourism business.				
I can or will be able to obtain needed liability insurance at an affordable cost.				
If I plan for customers to enter a building on my property, I know if it was constructed for agricultural or commercial retail use.				
I can manage the additional business responsibilities associated with an agritourism operation.				
I know if the existing land and infrastructure can accommodate the agritourism activity.				

If you have answered “No” to most of these statements, then your agritourism activity might not be a good fit with your current farm/ranch business. Are there other agritourism activities that might be a better fit? If your answers are mostly “Yes” or “Maybe” then you are may be ready to continue taking steps toward implementing your agritourism idea.

3. Infrastructure

In the section above, we included a statement about whether or not your existing land and infrastructure could accommodate your agritourism business. Even if you answered positively, you may still need to modify your current set-up, or add new infrastructure that will support your agritourism activity. Fill out the table below to think through some of those details:

I need to build, improve or modify	Yes	No	Maybe
Parking area			
Driveways (material, widening, etc.)			
Restrooms			
Point of sale location			
Biosecurity options			
Other:			

How will you cover the costs of modifying existing infrastructure or adding new infrastructure?

Do special permits and licensing have to be in place in order for the activities to take place?

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Section 4: Understanding Legal Requirements

In this section of your Action Plan, you will evaluate your property's location, land-use zoning and identify which rules and regulations might apply to your agritourism enterprise.

Instructions: Work through the sections below. Do not feel that you have to complete this form all at one time. You will likely need to contact county and state agencies to get some of the information you need. Making these contacts may be your next step.

1. Site Plan

Draw a simple site plan of your farm and attach it to this Action Plan. Start with existing roads, driveways, buildings and landscaping. Then in a different color, add in any anticipated changes that may be needed for your agritourism business. Examples include: designated parking areas, roads, farm signs, structures, staging areas. You can make your own sketch or alternatively, find an aerial photo of your property and add in the details. This can be a very basic sketch at this point; then as you move forward with your idea you can develop a more sophisticated site plan.

2. County Planning Department

Each county may differ slightly in the way they name their planning department. Find your county government website and fill in the following information.

County: _____

Name of department: _____

County contact person (if listed): _____

Address of offices: _____

Website: _____

Hours: _____ Phone number: _____

Does it say how they prefer contact? _____

3. Your Current Situation

What is the zoning for the land where I plan to have agritourism? (EFU, Rural Residential, etc.)

Which existing buildings or structures (if any) do I plan to use for agritourism? How will I use them? Are they considered agriculture buildings?

4. Which permits or licenses might I need?

Use this table to write agritourism activities and products you plan to sell along with possible permits and licenses to investigate.

Agritourism activity/product	Possible permits or licenses. Agency to contact.

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Section 5: Managing Risk to Protect Yourself, Your Farm Business, and Visitors

This section of your Action Plan will help you assess and manage the risks involved with your agritourism business. Specifically, you will work through: reducing liability risk, ensuring the physical safety of visitors to the farm, product safety, and neighbor relations.

Instructions: Complete each section below. If you aren't sure of the answers or have not yet considered a particular risk management strategy, your next step might be to learn more or ask a professional for guidance.

1. Reducing Liability

While there is no way to eliminate liability risk all together, there are some things you can do to help limit your risk exposure and prepare for issues that arise. Answer each question below as it relates to your agritourism enterprise.

Insurance

Does my current policy include coverage for agritourism activities on farm?

Can I add agritourism activities to my existing policy and if so, what would be the cost?

Questions for my insurance agent:

*If you don't have insurance, perhaps your next step for this section will be to explore companies and find an agent who is knowledgeable about agricultural tourism. [A list of potential questions for your insurance agent is available as a fact sheet in the course materials.](#)

Waivers

Is my activity something I may want to have visitors sign waivers for? If so, what should I include so my guests are aware or know about before arriving or participating in the activity?

*If you are unsure if a waiver is appropriate for the agritourism activity you are planning, your next step might be to complete some research or ask an attorney for advice.

Signage

There are all sorts of signs that can be helpful to manage risk. Possibilities may include directional signage, parking, markers for uneven ground or potential slippery areas, “do not climb” signs, and more. We highly recommend that all farms/ranches that have visitors post the Oregon Agritourism Limited Liability Sign to use the Oregon Agritourism Inherent Risk Law protections. Detailed information about this sign is available as a fact sheet in the course materials.

Thinking about your operation, identify areas where signs or cautionary information may be important. List these areas and the type of signs needed below:

2. Physical Safety

Plan a walk-through around your property and look for areas that might be of physical risk to your visitors. A practice farm tour with friends or family that aren't familiar with your operation can also be helpful. Comprehensive safety checklists are available at <https://safeagritourism.org/>

Some risks that I am currently aware of and should be addressed are:

Risk Area	Ways to Reduce this Risk

3. Product Safety

Thinking about the products you intend to sell, are there any that need additional storage, licensing, packaging or labeling to sell directly to your customer?

Product	Storage (refrigeration, etc.)	Additional licensing	Specific labeling requirements

4. Neighbor Relations

Use this area to write down any concerns or thoughts you may have related to your neighbors. Will I have any potential traffic, noise, signage issues that might frustrate my neighbors. What communication can I do in advance to reduce this risk?

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Section 6: Marketing Your Agritourism Business

In this section of your Action Plan, you will evaluate your marketing goals, current marketing channels and complete a brief market analysis. This will help identify which marketing strategies best fit with your operation and which ones you might add into your plan.

Instructions: Work through the sections below. You do not have to complete this form all at once. Do what you can with the information you have available. Marketing goals and strategies change overtime as your business does.

1. Market analysis

What other agritourism businesses in my area are doing similar activities? Think in terms both of competition and potential cooperation.

Who are my potential customers?

How will I attract customers to my farm?

How will I stand out from my competitors?

2. What are my marketing goals?

Fill out the table below with your marketing goals, and how you plan to measure your progress toward those goals. For example, if your goal is to reach new customers how will you track that?

Examples of goals may be: Increase in sales, number of visitors, number of new newsletter subscribers, number of social media interactions.

Marketing Goals	How will I track it?

3. Evaluating my current marketing channels:

What are my main marketing channels? How do I plan to communicate with customers? Some examples of marketing channels are social media, website, mailers, newsletters, farm loops and food trails, Google My Business, connecting with tourism organizations.

My current marketing channels and how they could be used to promote my agritourism business:

Marketing ideas for the short-term:

Marketing ideas for longer-term:

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Section 7: Customer Service and Hospitality

In this section of your Action Plan, you will evaluate how you communicate with customers, manage visitor expectation, your current staff, and the physical appearance of your operation. This activity will help you identify areas where you can improve customer service on your agritourism enterprise.

Instructions: Work through the sections below. You do not have to complete this section all at once. As your operation grows and you become more confident in your customer service abilities, you will be able to refine your hospitality skills.

1. Communication channels

Fill in the table below. List the different ways that you communicate with and get information to your customers. For each communication channel, specify the time frame goal you have for responding to questions.

Communication Type	Yes	No	Time frame for responding to customers
Phone calls/voicemails/texts			
Social media (comments & messages)			
Emails			
Other:			

Are these time frames known to the others responsible for answering these communications?

What other communication channels would you like to add to improve your communication with customers.

2. Managing visitor expectations

How often do I keep voicemail messages up to date with hours and other important information?

How often do I currently update online information (website, Google My Business and Facebook)?

What is the time(s) of year I need to be updating this information? Should I be doing this more often?

3. Staffing and training

Who are the people that will be public facing for my business? Are they a good fit for this role?

List below the specific customer service roles that are important for your agritourism business. Beside each role, include the following:

- The staff person who you think would be best suited to that role or if you need to hire a new person for the role.
- The kind of staff training that may be needed to prepare people for the role (e.g., basic customer service, training on what your operation offers and the history of it, point of sales training, etc.).

What are some immediate steps I can take to make people feel welcome when visiting? (welcome/instructional sign, greeting customers, provide info on other restaurants, activities, attractions in the area, etc.)

4. Physical appearance of the farm/ranch

Fill out the table below for maintaining or improving the physical appearance of your farm/ranch. We leave some rows for you to add your own ideas.

Area	No, it does not need work.	Yes, it does need work.	How to fix it?	Does it need to be repeated?
<i>Example: front fence</i>		Yes	<i>Coat of new paint, fix broken boards</i>	<i>Every 2 years</i>
Buildings visible to public				
Driveway/parking area				
Are there large weeds?				
Clutter, materials, equipment need to be picked up?				
Restrooms				
Product sale area				

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