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ALBERTA FORAGE INDUSTRY NETWORK

PHASE ONE REPORT

APRIL 2008



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Executive Summary

The forage industry is significant in Alberta. There are an estimated 30,000 forage producers in Alberta, managing more than nine million hectares of land in forage and managed range and bush. Many other individuals and organizations are affiliated with the forage industry: forage producers, livestock producers, forage processors, suppliers, seed producers and sales companies, managers of rangeland/bush pastures and natural areas, conservation and reclamation organizations, turf grass and apiculture.

Forage has been a specialized area in governments (though recently there appears to be a decline in interest at the provincial and federal levels) and in the agricultural programs at many Alberta colleges and universities. At present, there is no Alberta organization to represent the many producers and affiliates associated with forages.

A grassroots movement to explore the formation of a provincial forage network began in 2007. The Agricultural Research and Extension Council of Alberta (ARECA) agreed to champion the formation of a provincial forage network in its infancy. Industry stakeholder endorsements and funds were obtained in support of a grant from the Advancing Canadian Agriculture and Agri-Food (ACAAF) program of Agriculture and Agri-Food Canada. ACAAF approved funding for Phase 1, for activities related to sector development, i.e. aimed at determining the level of interest and potential involvement of the forage industry in such a network.

The potential formation of the Alberta Forage Industry Network (AFIN) attracted the interest and participation of a large cross-section of the industry. A discussion paper and survey were shared with 111 Alberta organizations and individuals related directly or indirectly to the forage industry.

A forum held in Red Deer in December 2007 drew 65 participants, double the expected attendance of stakeholders; most delegates represented small to large organizations. This group overwhelmingly supported the formation of a provincial forage network, and two dozen people indicated their active interest in volunteering to help make AFIN become a reality. Discussions went a long way in identifying the challenges and opportunities for the forage industry, and the vision and objectives of the network.

Priority issues were seen to be:

1. **Issues related to identity and recognition of value of forage industry.**
2. **Issues related to research: funding support and gap between industry research needs and government funding program criteria.**
3. **Issues related to sustainability: rising costs, competition for land use, etc.**

Priority opportunities were identified as:

1. **Opportunities to Communicate: united voice, info exchange**
2. **Opportunities for Research: research priorities, funding, extension**
3. **Opportunities to Influence: advocacy, government policy, funding**
4. **Opportunities for Environment: water, air and soil quality; land use**

Priority objectives for AFIN were identified as:

1. **Communications: identify common concerns and speak with one voice**
2. **Advocacy: influence government and industry re: policy, environment**
3. **Leadership: Be a champion for forage research and extension**

Priority next steps in forming AFIN were agreed to and included:

1. **Gather information and awareness of the value of the forage industry.**
2. **Establish credibility for the network by uniting (leads to funding, influence)**
3. **Form an organization and mandate that will work for us**
4. **Find champions to support AFIN.**
5. **Speak with one voice as advocates for the forage industry.**

A preliminary report was drafted and a follow-up session was held in Nisku on February 5, 2008. This time participants focused on prioritizing needs and next steps, and formulating the ways and means to structure and start up operations.

Though a stand-alone organization is desired over the long term, participants recognized that at start up, AFIN may need to be primarily volunteer-driven and dependent on short term funding. They also identified teams or committees that would take on this work: Executive, Research, Communications, Education/Outreach, Policy and Advocacy, Opportunities, and Funding and Sustainability. There were 15 people who volunteered to lead or serve on ones of these teams; added to the people who volunteered at the Red Deer forum, we now have a solid base of volunteers to continue the work.

The two primary needs are to activate communications and fundraising. Communications within and outside the network is a priority focus as AFIN continues to attract and strengthen its relationships with people in industry, government and other organizations. Start-up funding and long-term sustainability were recognized as challenges for AFIN as they are for any new organization; discussions on potential funding sources offered a wide range of options. Though there was a consensus at the Red Deer forum for establishing a stand-alone organization, participants at the second forum agreed that funding realities make an affiliated network more practical in the short term. It is hoped that additional AACAF funding can be obtained to support Phase 2, which will focus on the establishment of the new organization.

A draft vision and mandate for the new organization were developed:

Vision: The Alberta Forage Industry Network will speak with one voice for the forage industry in Alberta.

Mandate: The Alberta Forage Industry Network provides a unified provincial voice for forages in order to foster two way communication, champion research and extension, and influence policy and practice.

Purpose:

The purpose of this report is to capture the feedback and opinions of the forage industry regarding the potential formation of an Alberta Forage Industry Network (AFIN) as communicated in writing and at two provincial forums held on December 10, 2007 and February 5, 2008. It also includes ideas and recommendations on ways to move forward in the development of this provincial network.

The purpose in forming a provincial forage network is to give the forage industry a united voice. AFIN could represent the forage industry by partnering or advising government in the formation of policy; seeking support of needed forage research and extension; and other objectives that were discussed and prioritized during Phase 1 of the initiative.

Participants in discussions expressed a vision for an organization that uses a unified team approach to support common interests - a collaboration by a diverse network of stakeholders will make for the greater good of the Alberta forage industry. Stakeholders saw the first steps to be determining those common interests, issues and needs that a provincial forage network could address, and then to set priorities on how to address them. One participant asked that the work “begin with an economic choice on how to use the land.” Though effective land use management is a broader topic than forage, it is certainly an underlying concern for the forage industry as we move forward.

Methodology:

The results contained in this report were obtained from the following sources:

- Statistics on the forage industry provided by Alberta Agriculture and Food, including an estimate on the value of the Alberta forage industry.
- Background information provided by Agricultural Research and Extension Council of Alberta (ARECA) on the startup of their council, and by the Manitoba Forage Council and the Saskatchewan Advisory Council on Forage on their structure and mandates.
- Case history on the start-up and structure of the Alberta Invasive Plants Council.
- Discussion guide with sections for comments and opinion was developed and distributed, along with a survey, in November 2007. Surveys and comments on the discussion guide were received in advance from people unable to attend the AFIN Forum in Red Deer on December 10, 2007.
- Facilitated discussions and summaries of break-out sessions held during the AFIN Forum in Red Deer, December 10, 2007 (65 participants).
- Evaluation forms completed by 41 participants.

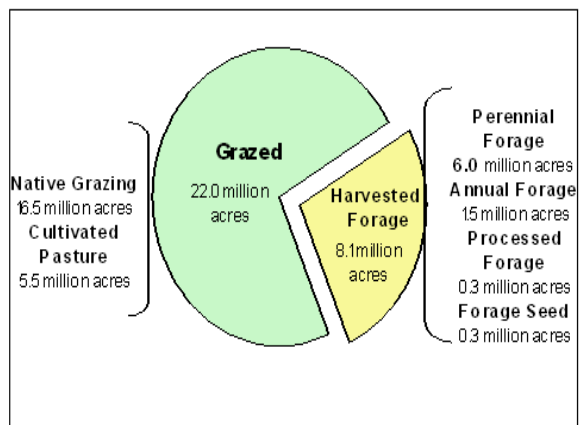
- Additional comments or surveys received by December 20, 2007.
- A preliminary report was written and distributed in advance of the February 5, 2008, forum in Nisku.
- Facilitated discussions and summaries of break-out sessions held during the AFIN forum in Nisku on February 5, 2008 (36 participants).

This report contains a compendium of the forum discussions and written feedback, along with decisions and recommendations.

Background

The forage industry is significant in Alberta. There are an estimated 30,000 forage producers in Alberta and many more individuals and organizations affiliated with the forage industry. At present, there is no provincial organization to represent their interests.

Forage Acres by Use - Alberta



In the 1990s, there was an Alberta Forage Council that represented the interests of the forage industry. In 2002, the Council merged with applied research associations to become the Agricultural Research and Extension Council of Alberta (ARECA).

Though ARECA serves some of the needs of the forage industry, its mandate is broader. As well, since many issues and opportunities are impacting forages at present, some forage producers saw a need to have a dedicated forage organization within which to respond, and asked ARECA for its help in getting it started.

ARECA agreed to champion the formation of a provincial forage network in its early years. ARECA asked industry for their support, and they responded with endorsements and funding in advance of applying for a grant from the Advancing Canadian Agriculture and Agri-Food (ACAAF) program of Agriculture and Agri-Food Canada. ACAAF approved funding for Phase 1, directed toward sector development to be undertaken from November 2007 to March 2008.

Phase 1 activities were aimed at gauging the level of interest and potential involvement of the industry in forming a sustainable provincial forage network, and looking at what that organization would look like and how it would function.

A discussion guide and survey were drafted to provide background information and statistics on the forage industry, and the former Alberta Forage Council and its successor ARECA. This background set the stage for a discussion of issues, opportunities and stakeholders in the forage industry and for a discussion of the objectives, structure, activities and potential funding sources for a proposed provincial network.

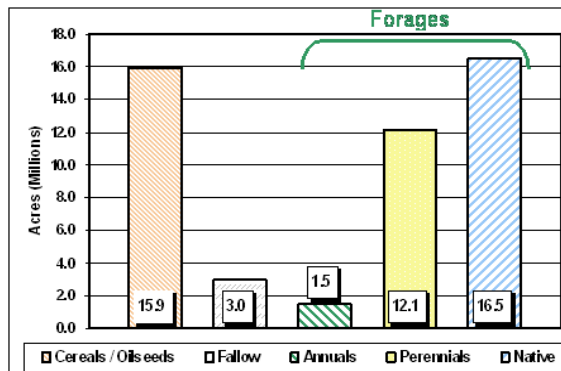
Every effort was taken to identify the individuals and organizations involved in the forage industry, directly or peripherally, who might have an interest in exploring the potential for a forage network. In November, 2007, 111 stakeholders were invited to send a representative to a forum to be held in Red Deer, December 10, 2007. Each stakeholder was sent the discussion paper and questionnaire, and encouraged to talk to their board or management to prepare a coordinated response. They were also invited to send 1-2 representatives to the forum to represent the “grassroots” needs of their organization. Those who were unable to attend were encouraged to provide feedback and opinion in writing using the discussion guide, survey or other format for response.

The results of forum discussions and completed surveys were compiled into a preliminary report that was distributed to all participants in January 2008. This report was used as the basis for discussions held at the February 5, 2008, forum in Nisku.

Value of the Forage Industry

One need that was identified early was the need to determine the value of the forage industry. At present, existing research only documents the amount of land use for forage (*see graphs and stats below and on page 5*); it does not identify the number of producers in Alberta or the economic value of the industry.

Agricultural Land Use - Alberta



Land use

Natural land for Pasture 27, 466 farms and 16,135,646 acres

Tame or Seeded Pasture 22,997 farms and 6,137,362 acres

Hay and Field Crops

Forage Seed Harvested as Forage Seed 1,046 farms and 244,615 acres

Alfalfa and Alfalfa Mixtures 22,211 farms and 3,935,022 acres

All other Tame Hay and Fodder Crops 12,204 farms and 2,060,967 acres

Corn for Silage 586 farms and 70,411 acres

Mixed Grains 2,047 farms and 373,005 acres

(Statistics Canada Census Year 2006 - Alberta Data)

Participants at both forums see confirming the economic value of forage as an important first step in achieving the Alberta Forage Industry Network's goals. As one participant said, "Money talks."

Dale Kaliel, an economist at Alberta Agriculture and Food, was asked to address the topic at the February 5 forum. He posed the idea that the Alberta forage industry could be worth as much as \$30 billion based on the average value of an acre of land, which is currently at \$1,000 per acre. A figure could also be posited based on the value placed on forages in other provinces/countries.

Once Kaliel receives the latest census figures, he will do more work. The focus will be to develop descriptors of the industry and calculating land value and equity, and bid value and profitability. For example, right now beef is seen as an asset in land equity; the value of forage, "the land beef walk over," accumulates over time and builds long term equity.



There should also be ways of measuring the financial value of the positive environmental value of forage to land, water and air quality, and of figuring out potential loss from forage not being valued. The question was asked: How many acres need to be converted to other uses before people start to take notice/place value on the industry?

Recommendation 1: Approach both the federal and provincial governments to see if they can confirm the number of producers involved in forage production in Alberta and the economic value of these crops.

Vision and Mandate

A consensus was reached at the first forum that there was a need for an Alberta Forage Industry Network. Discussions throughout phase one discussed the need to define the vision and mandate of this fledgling organization. Though still in the draft stage, they have been identified as:

VISION: The Alberta Forage Industry Network will speak with one voice for the forage industry in Alberta.

MANDATE: The Alberta Forage Industry Network provides a unified provincial voice for forages in order to foster two way communication, champion research and extension, influence policy and practice, and operate in a responsible, sustainable way.

Forage Industry Issues

Forage industry issues identified in the discussion paper included:

1. No voice for the forage industry in addressing their issues such as research funding and focus, government policy, risk management, environment, etc.
2. Reduction in forage research and extension in Alberta.
3. The impact of the bio-energy dynamic on competition for land resources.

4. Higher grain prices and lower cattle prices will mean more reliance on forages for feed. The push for utilizing grains for biofuels will likely keep grain prices high. This may mean a shift of more productive pastures moving out of forage production and into grain production.
5. Pasture/range soil health.
6. The high cost of fertilizers may lead to a reduction in forage fertilization.
7. Narrowing of seed sources and seed quality.
8. Lack of forage variety trials.
9. Insect pressure are rising with reduced control measures.
10. Brown bag seed sales and competition from annual crops for forage seed land.

People who submitted surveys or responses in advance of the survey were asked to suggest other issues. Their responses included:

1. Pesticide (both herbicide and insecticide) research and registration for use on forages.
2. Lack of mentorship support.
3. Valuing carbon credits and watershed protection related to native and tame forage.
4. Exchange rates, transportation costs and international competitiveness.
5. Federal government's shift from applied research and extension (benefiting producers) towards more basic science and commercialization. (mirrored on the provincial front).
6. Regulatory hurdles that may inhibit the development and availability of new feed and forage varieties.

At the first forum in Red Deer, a group discussion of issues facing the forage industry identified the following:

Industry Weaknesses:

- forage industry is diverse and fractured with wide variety of stakeholders
- lack of forage research and research that exists is not shared
- no common voice and little recognition of the value of forage industry
- forage in competition for land use
- lack of resources: money and people, and poor coordination of resources
- government and producers have different focuses; forage has little say in policy
- very little information/education on how to make forage profitable/marketing
- Forage industry highly dependent on exports (livestock, processed forages, see and forage byproducts such as honey) so increasing costs of transportation and high value of Canadian dollar have an impact
- how to establish/position forage as its own profit centre (challenge)

Industry Strengths:

- forages are very sustainable and environmentally friendly
- Alberta climate provides top quality forage products
- forage industry's diversity can also be a strength
- many excellent producers who have a passion for the industry
- 65% of crops in Alberta are used in forages; some land is only suitable for forages
- ready market for product: forage is the backbone of the ruminant industry; the

- equine industry is the largest purchaser of stored forage
- synergy with beekeeping industry: no cost benefits
- forage research being done is good

Survey respondents were asked to identify the top three priority issues; their answers for the most part echoed those identified at the forum, with research being the most important priority.

Comment: To stay competitive, the forage industry will need to depend on research. Since the use of forages covers a variety of topic areas, there needs to be a better method of filtering needs.

The top three priority issues were determined to be:

- 1. Issues related to identity and recognition of the value of the forage industry.**
- 2. Issues related to research: funding support and gap between industry research needs and government funding program criteria.**
- 3. Issues related to sustainability: rising costs, competition for land use, etc.**

Opportunities/Benefits

The discussion paper identified six key opportunities for the forage industry:

1. Opportunity to influence forage research priorities and research funding.
2. Opportunity to influence government policy and frameworks.
3. Opportunity to link policy to practice.
4. Opportunity to facilitate frequent communication and share information effectively.
5. Marketing opportunities.
6. Environmental opportunities, e.g. soil quality benefits, economics.

Survey respondents suggested additional opportunities:

1. Opportunity to partner with other organizations that utilize forages.
2. Opportunity to build a framework where provincial forage issues can be discussed and evaluated.
3. Opportunity to enter emerging markets, food or non-food related topics.
4. Opportunity to be involved in the development of cellulose digesters to sell power.
5. Opportunity to influence proposed carbon credit programs involving government and industry that may be revised/developed in future.

6. Opportunity to influence government, the oil industry and the public as to the importance of forage and rangeland to the health and diversity of Alberta agriculture.

A group discussion at the first forum addressed opportunities and threats related to the formation and operations of an Alberta Forage Industry Network:

Threats:

- large diverse organization might make consensus on issues difficult
- narrow definition of what forages are, i.e. agriculture only
- lack of focus: forage production is a unique, diverse and complex industry
- can't give compelling argument re: forage as its own profit centre (funding issue); people unwilling to invest without information on ROI
- lack of promotion about the importance of forages
- lack of resources (time, dollars, leaders)
- other issues are currently front and center in government/public mind
- some crops competing for land base are very well supported
- possible perception that this group is out to grab taxpayer dollars

Opportunities:

- branding of "Alberta Forage" will lend strength to forage products
- creates awareness about size of industry
- forages are perpetual: keep working and moving forward
- advantage to many industries to have united voice; time is right to make decisions, come together
- network could have strength in sheer numbers; many people involved in forages; "many hands make light work"
- positive impact on environment needs to be promoted and used to advance industry (environmental stewardship)

Comment: Partnering with other organizations that utilize forages would enhance the value of the information being distributed on forages and also create a feedback mechanism through which specific needs are identified. You would also likely obtain greater support for research or funding initiatives. AFIN could function as a central body that other groups could relate to, e.g. RT Linkages, Alberta Barley Commission, ASBs.

During the breakout sessions, two groups were asked to identify three issues/priorities for industry and one group, three opportunities a provincial forage network could address. The results were similar:

Group 1: Forage Industry Issues and Priorities

1. Need a unified political voice for forages
2. Determine and improve awareness of the value of forages
3. Sustainable funding for AFIN.
4. Need for a common goal – narrow the broad focus of the forage industry
5. Competition: forage vs the world, forage vs other industries

Group 2: Forage Industry Issues and Priorities

Three priorities:

1. Become a unified voice to:
 - a) identify common interests
 - b) demonstrate economic and environmental value.
2. Bring things together:
 - a) research & extension
 - b) issues management
 - c) advocacy
3. Funding for:
 - a) the organization + network
 - b) initiatives

Group 3: Forage Industry Opportunities and Benefits

Three priorities:

1. Environmental benefits, e.g. goods and services; water, soil and air quality
2. Potential for non-ag partners for funding + resources, e.g. oil and gas
3. Single source for forage information and marketing

Respondents replying in advance also identified research as the top priority, followed by influence policy and environment (tie), and then information exchange and marketing. One survey respondent identified benefits and challenges in forming an Alberta network:

Benefits:

1. Develop focus on core issues the forage industry is facing now and in future.
2. Ensure issues are properly assessed and based on clear objectives and outcomes.
3. AFIN could provide a one stop contact point for forage initiatives in Alberta.

Challenges:

1. Time commitment needed from AFIN participants to make this work.
2. Developing a model that all AFIN participants will see value in.
3. Developing short and long term goals with measurable outcomes.
4. Having enough knowledge and expertise to put together viable proposals.
5. Developing working relationships with other sectors of agricultural industry.
6. Adequate financial resources to maintain this structure.

The top four priority opportunities were identified as:

- 1. Opportunities to Communicate: united voice, value of industry, info exchange, technical transfer**
- 2. Opportunities for Research: research priorities, funding, scientific research, applied research and extension**
- 3. Opportunities to Influence: government policy, funding, industry practice**
- 4. Opportunities to support the Environment: ecological goods & services; water, soil and air quality, best land use practices**



ALBERTA FORAGE INDUSTRY NETWORK OBJECTIVES

The discussion guide identified the following potential objectives for AFIN:

- Facilitate communication and information sharing to support the forage industry.
- Actively engage stakeholders in the development and influencing of agricultural and agri-food policy.
- Develop timely and coordinated responses on behalf of the Alberta forage industry to address existing and emerging issues.
- Support the long term development of the industry through identification of research and marketing strategies that will benefit the forage sector.
- Provide a champion for forage research and extension.

The mandates of the Canadian Forum on Forage Crops and Rangelands, and the forage organizations in Manitoba and Saskatchewan, include additional objectives:

- Initiate and support programs and policies to improve the Alberta forage industry.
- Identify challenges and opportunities related to forage and seed production.
- Promote the optimum use of forage for food, seed and fiber production.
- Promote the use of forages in crop rotations and fragile soils.
- Provide advice on variety registration and seed quality issues.
- Coordinate regional and provincial testing.
- Advise on rangeland issues.
- Bring forward concerns regarding education, trade, technology transfer.
- Influence research and development.
- Market development.

Group 1: AFIN Objectives

Three priorities were identified:

1. common voice: identify common concerns and speak with one voice
2. advocacy re: policy, environment
3. advocacy re: research and extension

Group 2: AFIN Objectives

Three priorities were identified:

1. Establish credibility as an organization.
2. Partner with other organizations.
3. Define goals and actions.

Group Discussion: AFIN Objectives

Priorities agreed to at the first forum:

1. Support and advocacy for forage research
2. Influence policy
3. Gain industry support – voice, funding, seat at the table

Survey respondents named similar priorities: communications, research, policy and leadership, and identified communications as the top priority.

Comment: The success of AFIN will be dependent on the value that participants see coming out of this organization. Values will vary with each organization. It is important that AFIN recognizes these differences and tries to address them on a regional, provincial or national level. For many groups, I'd suspect that the value in this type of organization is in developing strategies to help remove roadblocks that are limiting forage industry development.

In summary, the three priority objectives for AFIN are:

- 1. Communicate: identify common concerns and speak with one voice**
- 2. Advocate: influence government and industry re: policy, environment**
- 3. Be a champion for forage research and extension.**

AFIN ACTIVITIES:

Short-term Objectives/Activities:

Activities identified in the discussion guide to support AFIN startup:

- Identify forage issues and opportunities
- Establish priorities
- Develop plan of action
- Develop team terms of reference and recruit team members
- Develop an operational framework that will support the network.
- Seek funding for the formation of the network and continued sustainability.

Priority next steps identified in a group discussion at the first forum:

- 1. Gather information and awareness of the value of the forage industry.**
- 2. Establish credibility for the network by uniting (leads to funding, influence)**
- 3. Unite: speak with one voice; form an organization and mandate that works**
- 4. Find champions to support and lead AFIN.**

Participants were also asked to name priority steps on their evaluation forms. A sampling of their answers is found below:

Leadership:

Form an ad hoc committee/think tank to look at issues, funding, membership, sustainability.

Gather a team together (small, 8-10 people) to decide on priorities for next meeting.

Establish a smaller steering committee to keep the ball rolling.

Form a board of directors with stakeholders and move on from there; keep numbers small.

Find an advocate who both consumers and industry recognize as a leader and voice of the group.

Solicit volunteer leadership from participants to take steps to establish an organization.

Working/steering group to continue gathering feedback, consolidating participation, thinking and prioritizing participants' wishes before, during and after a follow-up conference.

Objectives:

Decide what we want the network to do (and not do).

Define objectives more precisely.

Get consensus on "what the organization does", objectives and then form an effective organizational structure.

Further clarification of 1) goals and objectives and 2) how to meet/prioritize them.

Structure:

Formulate structure for AFIN: develop stakeholder policy, levels of membership & input.

Create a charter that defines the mandate and participants.

Bring forward a proposal to this group on organization, direction, objectives and funding.

Proceed quickly to policy, by-laws,, organization structure.

Identify committed groups and priority activities.

Put some thought out tangible options forward re: structure, agenda, ownership.

Funding:

Solicit government and industry funding.

Funding – steps should be taken not to overlap funding presently given to other groups, e.g. forage assoc.; perhaps private industry may be willing, e.g. seed companies.

Prioritize – determine the economic benefit of forages, need concrete numbers – value we add to economy with improvement.

Communications:

Summarize information from forum to share as soon as possible.

Develop a communications plan.

Comment: AFIN can't be everything to everyone – must identify outcomes and timelines or members will lose interest/enthusiasm. Follow through – don't let it stall.

People who responded to the advance survey chose similar short-term priorities:

1. Needs leadership that can manage the growth of AFIN and maintain the involvement of network partners.
2. Evaluate several structural models to see what might provide the best framework under which AFIN could function.
3. Seek funding for the formation of the network and continued sustainability.
4. Identify priorities and develop a plan of action. Be clear from the start as to what AFIN can achieve and what it will be responsible for.

5. Develop an operational framework.
6. Develop advanced communications tools.
7. Develop a protocol to collect and package information from industry or government groups. Large data bases exist but have limited use due to fragmentation across groups.
8. Identify research needs for forage industries and lobby appropriate government or industry groups for support. Process has to be well supported by well thought out proposals from AFIN participants.

Long-term Objectives/Activities:

Long term activities identified in break out sessions at the first forum:

1. Advanced communications tools
2. Collect and package forage information
3. Identify research needs for forage and lobby/advocate for support
4. Develop communications strategy
5. Follow slow process of adoption (systems reality)

Long-term activities identified by survey respondents did not differ from objectives:

1. Research: initiate and support forage research and development in partnership with other organizations.
2. Lobby: lobby on behalf of the industry.
3. Communications: develop communications tools such as website and newsletter and manage media relations
4. Extension: support for extension activities such as conferences, workshops, tours.

Comment: AFIN could be a recognized united voice that would garner greater support in areas such AS research or policy change.

AFIN ORGANIZATIONAL MODEL

Three organizational models were detailed in the discussion guide:

1. Forage industry network driven by volunteer-based teams
2. Independent organization based on grassroots participation
3. Government agency/committee with government staff and funding

Members of a breakout session at the first forum identified the need for:

1. an organizational model that permits participation
2. a lobby group
3. leadership in developing communications strategies
4. a network of forage producers and organizations based in Alberta
5. voting members that represent recognized organizations
6. good representation from producers, industry research and government

Group Discussion at first forum:

1. **Stand Alone Model** (more than half preferred this)
2. Affiliated organization, e.g. ARECA (5 people)
 - A. Start large (inclusive) and then grow smaller and more focused, as needed
 - B. Start small and very focused, and then grow larger.**
(majority favoured B in the form of a steering committee to lead the process)
1. **Network** (more than 50% agreed)
2. Council (5 people)
3. Advisory group to government (3 people)

There was no consensus on organization structure from people who responded to the survey. However one individual stated the need for an organizational model that:

1. Permits participation by interested but recognized organizations within Alberta's forage industry.
2. Functions in terms of processing input from industry groups and developing actions that AFIN can move forward as a lobby group for the forage industry.
3. Provides leadership in developing communications strategies across forage associations and in delivery to industry.

Comments:

For long term success, I suggest the AFIN model be designed so that it can function as independently as possible, something like a 70:30 split between industry groups and government would provide an organization that is driven by industry.

However, the model design will be partially driven by the level of funding. If funding is limited, then a more streamlined model with fewer goals, e.g. lobby only, will be required. Individual participants will be responsible for a greater portion for the administration and coordination of AFIN.

If funding is not limited, then a larger structure with more goals could be considered. This would require a CEO type position who takes on more of the administration and strategic planning role. To be effective, I think AFIN needs to find funding to permit the hiring of a CEO type position versus depending on volunteers.

An organizational model for AFIN was discussed more fully at the second forum. It was preceded by a case history on the formation of the Alberta Invasive Plants Council by Kim Neilson, a co-chair of AIPC which is summarized below:

Alberta Invasive Plants Council

AIPC began a year ago and now has member terms of reference, a board of directors, and four committees: Education and Outreach; Collaboration; Nominating, Policy and Procedures; and Meeting Policy and Procedures.

AIPC funding comes from four sectors: Alberta government, other government (federal and municipal), NGOs and industry. The board is comprised of members from each of these sectors and terms are for three years (provides for continuity and change). Some funding also comes from a membership fee of \$30 per person and from project specific resources, e.g. North American conference in May, 2008 funded by Transport Canada.

Neilson's advice to AFIN:

1. Define organization's goal, deliverables, scope, guidance from board, resources and budget, governance, structure for making resolutions.
2. Ally at the national level with Canadian Forage Assoc, and partner on shared goals and messages. They are an industry based group, with funding generated by activity.
3. Determine what a staff person will do and justify the dollars. A volunteer team at the local level makes it work.
4. Direct actions to policy makers, not politicians.

At the second forum, one breakout session group proposed working toward the desired organizational model in two stages:

Model 1: ARECA Member

AFIN could become an ARECA member
 AFIN employee could work out of ARECA office
 This model could move toward Model 2.

Model 2: Stand alone organization

Incorporated as separate society, needs bylaws.
 Board of directors: 3 govt, 3 NGOs, 3 industry, 3 other.
 Executive committee: chair, vice-chair, secretary, treasurer.
 Directors at large
 Working teams

Both models require someone to serve as spokesperson, set priorities and do research. Both would need start up funding and a means of securing sustainability. Participants agreed that the two stage process was practical and achievable.

Comment: *AFIN should be structured so that it has good representation of individual producers from across the province; industry, e.g. seed and pesticide companies; research both private and public; and government at all levels (municipal, provincial, federal). To be a truly provincial organization, representation is needed from all parts of the province and its activities need to take place everywhere.*

STAKEHOLDERS AND TEAMS

The discussion guide included four criteria to consider as to who could be part of AFIN:

1. Inclusion: broad network of anyone who wants to participate; only forage producers.
2. Land use type
3. Type of organization
4. Geographic location

A breakout session at the first forum proposed several ways of determining teams.

Proposed Stakeholders/Teams by Forage Type:

1. Forages/Hay
2. Forages/Grazing
3. Forages/ Dehy & double compressed
4. Forages/green cover (rec. turf, etc.)
5. Forage seed growers
6. Forages/livestock feed (game)

Other type of stakeholder types that could be considered:

- Barley and pulse growers
- Agricultural fieldmen
- Hutterite/colony producers
- Feedmill association (ANCC)
- Exporters

This group also looked at organizing teams by industry type or activity:

1. Producers: beef, dairy, horse, sheep, bees, turf, reclamation
2. Environmental organizations
3. Research/Educators/Technical Transfer (Extension)
4. Marketing: value added processors
5. Communications/Funding/Policy/Advocacy
6. Industry: sales reps, seed companies

The group discussion at first forum supported the teams by forage type approach, but added two additional categories: government and combination.

Survey results were inconclusive on this topic. One respondent suggested these teams:

Variety Testing	Insects and disease	Industry issues
Forage agronomy	Pasture and range	Hay and Dehy marketing
Feed and forage quality	Technical transfer	Seed production

A group discussion at the second forum led to a redefinition of teams by type of activity:

1. Research Priorities and Funding
2. Communications
3. Education and Outreach

4. Advocacy and Policy
5. Opportunities
6. Funding and Sustainability

During group discussions, communications and fund development were seen as the two most urgent priorities for AFIN during its formation.

These categories were more fully explored in the afternoon breakout sessions. Each subsection below contains ideas and opinion generated throughout phase 1:

Research Priorities and Funding Team

Three priority Research Opportunities were identified at the first forum:

- 1. Collectively identify opportunities for research.**
Use research as a radar screen to look for new opportunities; give equal weight to ecological, production and economic issues.
- 2. Influence research funding.**
 - a) lobby existing sources for funding, e.g. Alberta Livestock Industry Development Fund (ALIDF), Alberta Crop Industry Development Fund (ACIDF); right now forages fall through the gap
 - b) industry associations that may have funding dollars, e.g. equine group
 - c) consider establishing an independent forage industry fund
- 3. Use network as a framework for identifying, discussing and prioritizing research needs, and getting information out to stakeholders.**

Comment: AFIN could take a lead role in providing a framework through which needs could be identified and promoted by a unanimous industry voice... research initiatives need to be based on identifiable opportunities and not be just a wish list of topics that are perceived to be important but have limited value to the industry.

There was also a breakout session that addressed AFIN's Research Objectives:

- Serve as a clearing house for completed research; mandate to coordinate and catalogue, so the research is readily accessible, e.g. foragebeef.ca.
- Apply research from other regions to Alberta.
- Identify what research Alberta producers and customers want, prioritize
- Have research results verified by an independent third party
- Make sure there are dollars available
- Form partnerships with industry, customers and suppliers
- Pool resources to accomplish better results
- Make sure we still have researchers in the country
- Package existing information into a usable form

- Research to help make forages competitive with other crops
- Consider having a role in introducing novel traits in forages
- Fund research - place to go to have projects funded
- Research new markets, e.g. biofuels, omega 3s; with the coming of biofuels, we may need to produce more per acre

At the second forum, additional discussion determined there was a need to:

- Advocate for a dedicated forage industry fund.
- Identify priority areas to convince government to contribute.
- Sell the idea of production research based on environmental benefits.
- Find win/win benefits for grower and feeder; consultation required.
- Research cereals for forage production.
- Improve margins between value and costs by:
 - a. adding value through:
 - CO2 capture (carbon credits)
 - Soil preservation
 - Eco value
 - Increased productivity (better varieties, pasture rejuvenation)
 - b. reducing costs by: reducing inefficiencies/waste during harvest, storage, feeding out

Five people volunteered to serve on the AFIN Research Team.

Communications Team

A breakout session at the first forum addressed this topic and determined that the first step was to develop a communications strategy that would contain the following.

Internal	External
Newsletter	Print or e-newsletter
Website	Website
Meetings	Local meetings
Email existing organizations & clubs to get the word out	Trade shows
Share success/what's in it for me?	Forage associations, grazing clubs
Conferences	Workshops
WIIFM	WIIFM
Stakeholders and those benefiting from the forage industry	Hay directory/grading system, e.g. AAF Roping In website
Share success stories	Geographic breakdowns
Share expertise	Export markets
Share new technologies	Media releases (radio, print)
	More stakeholder involvement needed

Comment from survey:

Develop a communications strategy first. Being able to demonstrate an effective process for moving information from the research or policy level will be important when requests are made for support. One of the major criticisms of the forage industry has been that adoption lags existing knowledge. This is partially the nature of the industry in that change occurs in small increments over a long period of time. As a result, the net impact from research, etc. is less impressive than what we see with commodity groups. This slow process needs to be calculated into AFIN's decision making process and any communications strategy for the forage industry.

At the second forum, the group that addressed communications identified the needs as:

Get to know industry and each other first, external afterward.
 Education to public through mentorships.
 Find and compile current knowledge; new knowledge transfer.
 Technology transfer: variety, techniques, something marketable.

Next steps: Need email addresses
 Network with other organizations to see what they do.
 Get help in getting documents written, e.g. fact sheets.

Three people volunteered to serve on an AFIN Communications Team.

Education and Outreach Team

Note: There was some cross-over between communications, extension and technology transfer from the early stages of phase 1 to the latter. Consideration will be given to merging them as team's terms of reference are defined.

Three priorities were identified at the first forum:

- 1. Newsletter that covers the gamut of topics from basic to leading edge**
- 2. Merge forage industry with the researchers to develop win-win partnerships**
- 3. Address the gap between research and practical applications in the industry.**

Background notes from breakout session discussion:

- Need coordination of information and marketing.
- Partnership/pooling
- Rating system for producers, e.g. determine the quality of hay
- How do I find other producers/information about hay?
- How can I utilize (apply) forage information from outside of Alberta?
- Forage beef website www.foragebeef.ca excellent example of exchange
- Need variety of methods to communicate, e.g. newsletters aimed at specific audiences (schools, producers) and ways to get back responses

- Coordination/facilitation is key
- Use media
- How to narrow the gap between leading edge and average producers
- Need to get off the highway to reach producers (Bashaw, not Red Deer)
- Need new research to communicate:
 - a) in a producer friendly form
 - b) need to identify correct local influences
 - c) need to convince governments to use this method of applied information/adoption
- Need to partner more with researchers to develop win-wins, i.e. extension needs to be a vital component of the research program (plans & dollars).
- Researchers need to be in the field with the extension staff to help them identify needs and gaps; they need to be recognized and paid for this extension work.
- Organizations should pay for courses

Discussions at the second forum were merged into the communications breakout session.

Two people volunteered to serve on an Education and Outreach Team.

Policy and Advocacy Team

At the first forum, one breakout session developed the following objectives:

- State expectations of/to the government regarding their long term roles/responsibilities
- Form regulatory/legislative framework for issues such as land use and environment
- Research priorities (funding and staff)
- Extension priorities (funding and staff)
- Money talks

At the second forum, a breakout group concluded that AFIN would need to create:

1. A process for defining common interests and issues to take forward.
2. An action plan.
3. A statement of expectations regarding government's long term roles and Responsibilities to the forage industry.
4. Solutions.
5. Partnership to support government's efforts to form a regulatory/legislative framework for issues such as land use land environment.

The following action plan was proposed:

- Stakeholders – involve a diversity of people representing areas such as rangeland. cultivated pasture, hay producers, industry reps (double compressed, bees, etc.)
- Poll AFIN members to confirm top three issues and take these forward.
- Form a team of six (?) to provide leadership; meet 1-2 times a year; get feedback.

Comment: There is a large acreage of forages grown in Alberta and also a large acreage of rangelands in the province. There are also a large number of government departments and agencies, and NGOs that have an interest and focus on forage and native rangeland management. At the same time, there seems to be reduced interest in doing forage research and the infrastructure of former provincial and even federal extension agencies has been decimated or is being eroded. To me, these facts are more than enough reason for the development of an organization that will represent forage and range interests across the province.

Opportunities Team

One breakout group at the Nisku forum looked at how to influence/involve industry. They suggested AFIN focus on areas of common concern/interest such as:

- Transportation costs
- Marketing/opportunity costs, e.g. export
- Risk management/mitigating risks
- Standardized marketing (fragmented at present)
- Standardized grades: quality, purity
- Defining Production values (native, marginal losses)
- Identifying common bonds/trends that will create win/wins
- Guiding research and extension (chemical trials, mixed stands)
- Maintaining know-how and productivity
- Succession planning for industry (today's forage producers are aging)

Action Plan:

1. Identify common bonds between stakeholders.
2. Identify collective opportunities for marketing, R & E, EGS
3. Proactively support succession in the industry
4. Hold an annual forum for industry reps.

Funding and Sustainability

AFIN Phase 1 was funded by ACAAF, an Agriculture and Agri-Food Canada program administered by the Agriculture and Food Council. A break-out session at the first forum explored other potential ways to obtain funding:

- a. Check-offs
- b. Funded by “grassroots”, producer driven
- c. Government matching
- d. Diverse funding sources
- e. Memberships (ownership & accountability)
- f. Other (non-ag) sources, e.g. hunting licenses
- g. Sponsorship
- h. Fundraising, e.g. lotteries, casinos
- i. Research funding fee
- j. Stand alone vs affiliated
- k. Advocate for an industry development fund
- l. Loyalty program

Challenges posed by these funding options:

- Check-off is expensive and difficult to administer.
- Government matching usually only good for projects.
- Funding linked to research is usually short-term, new money that usually requires 50% industry cash first/
- Memberships are unreliable and exclusive; could be offered at different levels, e.g. producer, organization.

Comment: Funding should leave AFIN as independent as possible in terms of where support is directed. Potential partners need to receive value for their investment. If AFIN has large “grassroots” support, it should be able to tap into support from both the provincial and federal governments.

Second forum

Potential funding sources were discussed further at the second forum and included:

- Provincial Adoption Fund
- Green Cover
- Industry contributions in-kind or in dollars
- Carbon credits
- Third party program fund delivery, e.g. ARECA
- Environmental initiatives, e.g. Ecological Goods and Services
- Health initiatives
- AAFC/AAF downloading
- Dedicated Industry Development Fund

A break-out group at the second forum made estimates on the costs of operating a stand-alone network (estimated at \$150,000) versus the cost of a network affiliated with an existing organization such as ARECA (estimated at \$75,000). This came forward to the entire audience for discussion and a vote. The majority favoured AFIN being independent but affiliated in the beginning with an organization, and then moving toward a stand-alone operation in future.

This was a change in direction from conclusions at the first forum. Those with questions or concerns who were not present at the second forum should contact a stakeholder for further discussion. It is important that all stakeholders know why this change occurred.

Conclusion

There was overwhelming support for the formation of the Alberta Forage Industry Network from people who attended both forums or responded in writing. Most individuals represented large groups of stakeholders, and the size and value of the forage industry were shown to be significant. Phase 2 ACAAF funding will be applied to forming AFIN teams and getting the network up and running.

Appendix 1: Participants attending December 10, 2007 forum in Red Deer

Name	Organization
Christine Sweet	AFSC
John Reid	Solar Harvest Ventures Inc.
Ray McIsaac	Rafter 8 Products/McCoulley & Sons
Peter Walsh	Lakeland College
Brian Wintonyk	Dow AgroSciences
Allan MacCaulay	
Tamara Yurchuk	Champion Feed Services Ltd
Laura Bluck	Olds College
Trevor Hamilton	Olds College
Roy Clark	Western Stock Growers
Gary Telford	AAFC-PFRA
Jeff Loessin	Dow AgroSciences
Karl Slomp	IASPA
Weldon Hobbs	Alberta Alfalfa Seed Committee
Arvid Aasen	Alberta Agriculture
Leo Hazenberg	Legal Alfalfa Products Ltd.
Janet Dietrich	Alberta Agriculture & Food
Kent Price	Northsatr Seed Ltd.
Greg Blahun	West Central Forage Association
Tracy Dow	Alberta Agriculture & Food
Edward Shaw	International Quality Forage & Feed Inc.
Meghan Ford	LARA
Jane King	U OF A
Dianne Westerlund	Chinook Applied Research Association
Ross Hutchinson	Alberta Ag-Info Centre
Russ Horvey	Alberta Ag-Info Centre
Duane McCartney	Western Forage Beef Group
Albert Kuipers	Grey Wooded Forage Association
Dale Kaliel	Alberta Agriculture & Food
Calvin Yoder	Alberta Agriculture & Food
Matt Tees	Grey Wooded Forage Association
Kim Nielsen	Clearwater County Agricultural Services Board
Ken Pattison	Clearwater County Agricultural Services Board
Les Burwash	Horse Industry Assoc. Of Alberta
Terese van Bryce	Horse Industry Assoc. Of Alberta
Wim Ruysch	Alberta Milk
Kevin Dunse	Pickseed Canada
Jenifer Heyden	BRRG
Masahito Oba	U OF A
Kevin Nixon	Alberta Beekeepers

Doug Wray	Foothills Forage
Paula Negraes	Alberta Milk
Steve Mason	
Dee Ann Benard	ARECA
Laura McNabb	ARECA
Grant Lastiwka	ARECA
Joy Vonk	ARECA
Trevor Lindberg	Proven Seed/Viterra
Andrea Collins	ROI Communications
Jaimie Borduzak	Peace Country Beef & Forage Association
Darren Guidinger	Wilbur-Ellis Co
Amber Havens	Peace Country Beef & Forage Association
Russell Mellow	Wilbur-Ellis Co
Don McLennan	PFRA/AAFC
Mark Johns	Pioneer Hi Bred
Tom Krawiec	Ranching for Profit
Norm Ward	
Bill MacFarquhar	
Remo Pasteris	Agriculture & Agri Food Canada
Doug Bidulock	
Angela Burkinshaw	SRM
Greg Hale	Alberta Agriculture & Food
David .K. Wong	
Gerry Lettner	NAIT
Sten Lundburg	FFA
Steve Kenyon	GRO
Harvey donoghue	Feeders Assoc of Alberta
Peter Ball	Green Prairie
Dale Pulkinen	Canadian Dehyd Assoc
Ron Anderson	Horse Industry Assoc. Of Alberta

People/organizations responding by survey/in writing:

Alberta Beef Producers:

Edward Shaw, International Quality Feed and Forage:

Clare Tannas, Reclamation-Native Seeds:

Don McLennan, Range and Forage Specialist, PFRA/AAFC:

North Peace Applied Research Association:

Gordon Hutton, Forage Specialist, Alberta Agriculture and Food

Appendix 2: Participants attending February 5, 2008 forum in Nisku

First	Last	Organization	attended
Arvid	Aasen	Alberta Agriculture and Food	1
carla	Amonson	West Central Forage Association	1
Dee Ann	Benard	ARECA	1
Greg	Blahun	West Central Forage Association	1
Jaime	Borduzak	Peace Country Beef & Forage Association	1
Andrea	Collins	ARECA	1
Taracy	Dow	Alberta Agriculture & Food	1
Meghan	Ford	Lakeland Agricultural Research Association	1
Brian	Haddow	PFRA/AAFC	1
Amber	Havens	Peace Country Beef & Forage Association	1
Jenifer	Heyden	Battle River Research Group	1
Gordon	Hutton	Alberta Agriculture and Food	1
Dale	Kaliel		1
tom	Krawiec	Athabasca, AB	1
Albert	Kuipers	Grey Wooded Forage Association	1
Grant	Lastiwka	ARECA	1
Debra	Lozinski	ARECA	1
Sten	Lundberg	Foothills Forage Association	1
Steve	Mason	Alberta Milk	1
Duane	McCartney	Alberta Agriculture Food Canada	1
Ray	McIssac	Rafter 8 Products	1
Michelle	McKinnon	Alberta Agriculture and Food	1
Don	McLennan	PFRA/AAFC	1
Russell	Mellow	Wilbue-Ellis Co	1
Doug	Milligan	Horse Industry Assoc. of Alberta	1
Kim	Nielsen	Clearwater County/AAAF	1
Nora	Paulovich	NAPARA	1
John	Reid,	Solar Harvest Ventures Inc	1
Edward	Shaw	International Quality Forage and Feed Inc	1
kevin	Shaw	Pickseed	1
Clare	Tannas		1
Matt	Tees		1
Joy	Vonk	ARECA	1
Dennis	Wobeser	Hi Gain Ranching Ltd	1
Doug	Wray	Foothills Forage Association	1
Tamara	Yurchak	Champion Feed Services Ltd.	1