

# Peer group in a box



There can be incredible power in producer peer groups, with participants gaining knowledge and skills to help take their farms to a new level of success. The energy from peer groups also comes from shared experiences and a commitment towards personal and professional growth and development.

This resource is about producer-led peer groups; how to start one, and how it should function. This is recommended reading for any producer who wishes to harness the power of peer groups. This is also a collection of tools for producers who are thinking of starting a group, want to sustain an existing group, or are simply interested in learning about the power of groups.

Farm Credit Canada (FCC) and Farm Management Canada partnered to produce this resource guide because they believe in the power of peer groups and that the energy the groups create can help producers advance their business and production skills by learning from like-minded individuals.

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***So, you're interested in starting a peer group. Now what?***

## Introduction

### Why work in groups

There's power in groups: creative power, knowledge-based power and experience-based power. Corporations leverage their human assets to increase profits, to compete better, to forecast the future or implement change. Agricultural producers can get the same benefits through their participation in a group.

Here are some of the most common reasons to be in a group:

- **Increased knowledge:** Producers learn by sharing with other producers and by tapping into outside expertise.
- **Problem-solving:** Producers can bring different knowledge and experience together, generating creative solutions for group problem-solving.
- **Industry insights:** Producers can keep up to date on the latest industry trends, new technologies and management techniques.

- **Proven economic benefit:** Research shows that farm businesses that have been members of management groups for a number of years have an operating profit that is 43% higher, a return on assets that is 2.2% higher and a higher net worth.
- **Quality of life:** Finding enough time for themselves and for family has become a management issue for producers, so many groups include this in their discussions.
- **Mental health:** Working in groups is an enjoyable experience. Producers can form meaningful relationships with other producers, helping reduce feelings of isolation by being part of a trusted group.

#### **Different structures for different purposes:**

Peer groups come in all shapes, sizes and formats to facilitate the needs of the group. While some groups come together for a specific duration to achieve a common goal, others form as a way to stay connected and continue for many years. Successful groups organize meetings, learn about one another and care about each other's success.

#### **Informal and formal**

Peer groups range from informal groups who meet from time to time and focus on sharing best practices, to groups who gather on a regular basis. They may compare benchmarking data and seek ways to improve profitability. Perhaps the peer group focuses on working collectively to achieve a common goal, such as facing a crisis or seizing an opportunity, like gaining access to new markets.

#### **In-person and virtual**

In-person meetings remain the most common way for peer groups to meet. Especially when just starting up, it's a great way to build trust. It's also an opportunity for producers to get away from busy farm life to focus on the business.

Virtual meetings using online platforms can also work. Using social media tools including Facebook, WhatsApp, discussion forums and/or email lists is a great way to keep a group connected and informed. An email, text message or social media message can go a long way to stay in touch with members and keep the momentum going between in-person meetings.

### **Setting up for success**

#### **Starting a group – where to begin**

You've thought about forming a group and have found a couple of others who have expressed some interest. You're eager to take the next step. Here are some tips for forming a peer group and setting it up for success.

### **1. Start with a local champion** (this is most likely YOU!)

A range of approaches have been used for forming groups, but a personal approach is generally most effective. Leadership and motivation are very important in starting and maintaining a group. Identify a local “champion” (or perhaps more than one champion) who can make the initial invitation to form the group.

Your peer group champion is usually:

- committed to the industry
- well respected in the community and has influence
- knowledgeable about the issues that need to be addressed and the benefits of addressing them through a group
- willing to learn and implement new practices and techniques
- open to input and ideas from other group members

The champion is most likely a primary producer to ensure the group stays focused on producers’ unique needs, though this is not always the case. Some groups seek an outside professional to help facilitate discussion and coach the group towards staying on task to make meaningful progress.

### **2. Determine group size and composition**

First, identify who you would like to be involved in the group. You’re looking for producers who are interested in learning how to improve their business management skills and manage other risks that they’re facing. Members must be open to learning and sharing their experiences and successes.

Next, decide on the size of your group. You may want to start small with 5-6 dedicated members. Typically, smaller groups have an easier time building trust. Finally, decide how members will be recruited – perhaps by email, phone, text or at an industry meeting or event.

### **3. Use catalyst events**

The catalyst for creating a peer group is very often an industry meeting or event where producers come together, such as a field day, training workshop, barbecue, or local agricultural association meeting where a common problem or opportunity is identified for further exploration.

If the catalyst event is a crisis of some kind, you can move more quickly through the steps and call a meeting, using informal communication channels, such as other community groups, organizations and word of mouth so you can act on the issue in a timely fashion.

### **4. Sell the benefits**

When starting up or maintaining a peer group, convincing people to participate may be a challenge.

Here are some techniques for recruiting peers:

- **Use a one-on-one approach:** Knowing about prospective members’ operations will help you present the value of a farm group in terms they can relate to.

- **Be flexible in your approach:** It will make a big difference. Some producers are attracted by a farm visit, others by a social activity during or after the meeting, while others just want an email, text or phone call. Decide what will work in your situation or what combination, or alternatives, will attract enough people to create a critical mass.
- **Emphasize the value:** Talk about the value of lifelong learning and how peer groups can lead to increased knowledge, new ideas, problem-solving, cost savings or new revenue streams, and improvements to quality of life. Share common struggles and how peer groups can help producers overcome challenges and seize new opportunities. You may be able to share the positive results that you or others in the group have realized (anonymously or with their permission).
- **Ease into the commitment:** Explain to potential members that the first meeting is just to explore the idea and that they can decide whether to join or not later.
- **Mention the names of other group members:** Convey to them that the members drive the agenda and the farm management topics.
- **Provide flexible participation options:** If you're meeting in person and travel time is an issue, consider inviting them to an initial meeting and then ensure ongoing contact by video calls, phone, email or text, etc.
- **Value the input of a prospective member:** Make a point of listening to the prospective member to understand and help address their concerns and any hesitation in joining the group – it may lead to ideas for improving the group!

## 5. Establish trust

Achieving trust is imperative for the success of any group, and building it takes time. Successful groups take the time to learn about one another and care about each other's success.

Things to consider when building trust:

- In agriculture, in-person meetings are generally more conducive to helping build trust as social cues can help measure and manage the level of trust amongst group members.
- Smaller groups may have an easier time establishing and maintaining trust.
- Recruiting group members from different geographic locations or production sectors can help alleviate fear of competition.
- Farm visits and field trips to each other's operations can also help build trust.

Once trust is established, electronic means of communication through apps or virtual meetings can help build and strengthen trust.

## Time to meet

Now that you have gathered interest from your peers for starting the group, it's time to sort the logistics of your first meeting.

### Pick the first meeting date, time and location.

- Consider the growing season, weather and what other events are taking place to avoid scheduling conflicts.
- Consider polling group members and sending a few options to ensure maximum attendance.
- Give people at least two weeks' notice.
- Try to talk with everyone on the invitation list and get their commitment to attend.

### Host the first meeting

In the first meeting, the basic question facing each group member is "What will I get out of it?" It will be important to review the benefits of being part of the group and discuss expectations to garner their commitment to making the group work.

#### During the first meeting:

- Provide background on why/how the group got started, i.e. the overall purpose of the group.
- Have everyone introduce themselves, including the initial interest that got them to the meeting and their expectations for being involved in the group.
- Explore the important issues, challenges and/or opportunities that the group might like to focus on.
- Introduce the idea of skills development and how the group might contribute to each member's knowledge and skills.
- Discuss a common vision for the group, taking into account members' expectations and aspirations.
- Discuss speakers or a farm visit and topics of interest for the next meeting.
- Set the date, time, place and organizer of the next meeting.
- Share contact information between group members and consider creating a WhatsApp, email or text message thread for easy communication.

Check out the sample Peer Group Charter at the end of this document to help guide your discussion on establishing expectations, the vision and purpose for your group.

## Set a common vision

Establish a common vision for the group, that is, its main purpose for existing based on the expectations and aspirations of group members. This may be the starting point of the second meeting. Work towards coming to a consensus and putting the common vision in writing. This will ensure that participants clearly understand the focus of the time they'll spend together. Goals and objectives will flow from this broad vision, setting "checkpoints" along the way.

## Set common goals

After identifying a common purpose, or a broad vision of what your group wants to achieve, you can set goals, which are steps taken toward carrying out your group's vision. This may be done as a group or as individual goals that each member reports to the group.

In setting goals, it's useful to rely on the characteristics of "SMART" goals:

**Specific:** set a concrete goal that addresses results.

**Measurable:** state the goal in a way that you can easily measure progress.

**Agreed upon:** don't do it alone. Ask others to help and support you.

**Realistic:** members will adhere to goals they believe are achievable.

**Timely:** it is important to add a timeline for the goal to be achieved. Goal setting will create a basis to monitor your group's progress toward its vision.

This work may begin during the group's second meeting or thereafter. Group members should be encouraged to reach a consensus. That way, the goals can be put in writing for reference and reviewed as the group and individuals continue to meet and work towards their goals.

## Future meetings

Group members will be much more interested in participating when there are diverse activities. Members need to be consulted about what type of activities they'd like to organize or attend, their frequency and what they can contribute as a group member towards organizing activities.

Some examples of farmer-led group activities (all of which can happen in-person or virtually) include:

**Farm tours:** Tours are very effective and can include tours of group member farms to help them with specific questions or challenges, or tours of farms or agri-businesses outside of the group.

**Farm problem-solving:** Have the group focus on a particular problem that a single member needs help with. This creates an environment for shared ideas and brainstorming to find a solution.

**Farm planning:** Have the group go to a farm where the owners are considering a major change and seek the group's collective wisdom as to how they might best proceed.



**Whole-farm analysis:** Have the group go to a group member's farm to analyze the entire operation and suggest where improvements might be made.

**Guest speakers:** Discussions may be sparked by guest speakers, watching a video, working on a case study, or posing a question or problem and brainstorming possible answers or solutions.

**Production record reviews and critiques:** These can focus either on the broad production records of one member farm or a specific production area across all member farms.

**Financial record reviews and critiques:** These can be done on an individual farm within the context of a farm question or challenge like remodeling, expansion, a major purchase or a general financial management discussion across all member farms. Case studies can be used to address concerns over sharing specific financial data.

**Regional farm show:** The group can attend a regional farm show or event together. Attending together is a chance to discuss new products or innovations at the show and seek outside experts who may help the peer group reach its goals.

**On-farm demonstrations:** These provide the opportunity to implement and evaluate new practices or technologies in specific farm situations. A group may wish to sponsor such demonstrations or simply visit demonstration projects. While demonstrations lack the discipline of research, they can still provide valuable experience and anecdotal information.

**Field research trials on group member farms:** This activity allows producers to put more confidence in the results. They also build closer working relationships between producers and researchers and allow researchers to learn from the practical experience and knowledge of producers.

**Field days on innovative topics:** These are highly effective. When you hear about a fellow farmer using innovative technology or practices, contact them and organize a group visit so your members can benefit and possibly reproduce these new approaches.

## Effective meetings and engagement

### Role of the leader

Every group needs a leader or leaders that have the ability and skills to motivate members and contribute to the group achieving its goals. Although some groups hire facilitators to support their work, leaders are often members of the group and take charge because of their natural abilities. As a leader, it's important to self-assess your skills and try to further your knowledge in areas where you might face some challenges. Why? Because the leader guides not only the content of the group, but motivates the group to work towards achieving its goals.

Some groups seek an outside professional to help facilitate discussion and coach the group towards making meaningful progress. Seeking outside help allows the group leader or leaders to fully participate in group discussions and benefit from the guidance of outside support.

The role of the facilitator is to keep the group moving towards the group's stated goals. By listening, observing and using their intuition, they are aware of individual needs and desires. While the group focuses on the tasks at hand, the facilitator focuses on the process and the people. With the proper facilitation skills and knowledge, a facilitator can help a group achieve its goals efficiently and enjoyably.

Special note: Facilitation is a profession and requires skills training to guarantee success.

### Values and attitudes of a good facilitator

An effective facilitator fosters:

- **Respect and Empathy:** where all ideas are important. No idea or individual is more important than another.
- **Cooperation:** where your group members must work together to reach the group's goals. As a facilitator, you cannot force individuals to work together, but you can create an environment for it to happen.
- **Honesty:** where you and the group need to be honest and open about your feelings, values and priorities.
- **Responsibility:** where the group must assume responsibility for the solutions and their implications. The facilitator assumes responsibility for his or her actions, which ultimately affect the content, participation and process of the session.

### Running effective meetings

Running a meeting is a skill that's only improved by practice. It's also a skill everyone in the group should learn. If group members change roles each meeting, it will develop everyone's skills as well as give members more empathy towards the difficulties of playing different roles.

### **1. Clarify the objectives for the meeting**

The group begins the meeting by ensuring that members understand and agree on what will be accomplished. Objectives include both the content of the meeting and the process by which objectives will be achieved, such as improving participation, gathering ideas, listening to others, finding agreement, and sharing challenges and solutions.

### **2. Review member roles**

Confirm who will be taking on specific roles for the meeting and what their roles will be. These can include chair, notetaker, timekeeper and facilitator.

### **3. Review the agenda**

- Present the draft agenda, with a copy for each participant or posted for all to see.
- Allow the group to modify the agenda.
- Approve the agenda.
- If appropriate, beside each agenda item include who will lead that portion of the agenda, the methods (e.g. brainstorming) to be used for that item as well as the approximate amount of time to be devoted to each item.
- The agenda will typically include the following information and will be formatted accordingly:

Date:

Time:

Location of meeting:

Attendees:

Call to Order

Welcome and Opening Remarks

Recap of Last Meeting and Follow-Up Items

Member Updates

Farmer-Led Topic of Interest or Activity

New/Other Business

Next Meeting: Date, Time, Location and Focus (topics, activities)

Adjourn

A fillable agenda template can be downloaded [fcc.ca/peergroups](http://fcc.ca/peergroups).

### **4. Keep a record of the meeting**

Flip charts are one good way to record the main points of a meeting because they allow everyone to see what's been captured from the discussion and what has been decided. Alternatively, a person can be designated to take notes and can read them back to the group at critical junctures. The group should check for corrections or additions to these meeting records and decide what information needs to be kept in the group's permanent transcript.

## **5. Set next steps and next meeting agenda**

By the end of the meeting, the group should discuss what needs to be done based on the results of the meeting. Often, there are multiple steps and tasks needing follow-up or planning. Agree on the work that needs to be done next in order to advance, who will do what, and by when. Clarify if necessary and complete the transcription of the goals, summarizing commitments to share with all participants.

## **6. Evaluate the meeting**

Members should take a few minutes to discuss what went well that should continue and how to improve the next meeting.

### **Keys to a great meeting**

- Remember to have fun!
- Be prepared, be early and bring the necessary documentation.
- It's best to have only one person talking at a time.
- When you participate, sit up straight and pay attention to your body language. A good rule of thumb is to turn off all electronic devices to give your full attention.
- Keep your ego in check, don't interrupt and don't start a side meeting.
- Challenge the idea, not the person.

### **Skills of an effective peer group member**

- Attends all meetings
- Comes prepared to all meetings
- Speaks up during the meeting, not after
- Keeps comments relevant
- Asks for the opinion of others
- Understands how to compromise
- Gives praise when due
- Organizes thoughts before presenting
- Listens when others speak
- Keeps confidentiality of discussions
- Receives and gives constructive criticism. A group is only as good as its members' ability to share or give information and seek or take information.

## **Communicating effectively**

When working in groups, communicating effectively is paramount. As interactions happen, it's crucial to maintain open and respectful contact among all members so that everyone feels equally respected and appreciated.

### **1. Talk in the first person**

Statements such as "I felt..." or "It seems to me that..." communicate personal responsibility for responses. They do not claim to speak for others.

### **2. Be specific**

Statements such as "When you said this, I..." or "Your idea about..." focus on the particular action or statement. Avoid general comments such as "You keep..." or "You always..."

### **3. Challenge the idea or action, not the person**

Focus on actions or behaviours that a person can modify, not on their personality.

### **4. Combine recognition of what worked with a challenge to improve**

Again, be as specific as possible. For example, if a person comes across as a know-it-all at times, but at other times fosters ideas from other people in a lively way, refer to the positive side as a specific model of tone, strategy and style to be emulated.

### **5. Ask questions to clarify or probe reasons**

Questions such as "What did you take into account when you decided...?" or "What did you mean when you said...?" credit the person with selection and judgment. The questions also help avoid criticisms and suggestions that are irrelevant to what the person is trying to do.

### **6. Identify the bridges**

When you are giving critical feedback to a member, remind them of what you have in common. Comments such as "I know that when we do X we tend to..." remind the person that you're on the same side. Sometimes a part of this same bridge may be to acknowledge differences. For example, "As a younger person/grain producer (etc.), my experience is a bit different than yours, but..."

### **7. Acknowledge how you connect to a problem**

Because people can learn as much from what goes badly as from what goes well, it helps to show how you've also experienced a similar problem. Statements such as "I've had this problem, too..." or "This is helpful for me/us to think about because..." emphasize that this is not just an academic exercise.



## Resolving conflicts

In any group, you'll encounter diverse personalities that are not always easy to deal with. For your group to progress without leaving anyone behind, you'll have to deal with these personalities, as all group members need to feel comfortable so they can fully contribute and participate in group meetings and activities.

It's important to remember that "difficult personalities" do not characterize the person as a whole. These individuals are often unaware of their negative impact on the group. As a leader and member of a group, you can intervene in a way that allows all participants to feel included and respected for who they are and what they can contribute. In doing so, it's important to focus on their **behaviours**, which can more easily be changed and that they may be more open to feedback on, instead of focusing on their personality. Sometimes, it's instructive to find out their **values**, which may be motivating their behaviour.

In all groups, conflicts are bound to happen. It's essential to deal with these situations as soon as possible, as their impact can sap a group's motivation and commitment.

**Conflict can be a positive element.** Without it, people wouldn't be challenged to think beyond their everyday, routine boundaries. We've all heard about the dangers and limitations of "group think" which can often stall progress or hinder creative thinking and solutions. When a variety of people with different perspectives comes together, differences exist. That diversity can enrich the discussion if the conflict and tensions that emerge are resolved and the group uses the learning to improve its work.

**Conflict can also be negative** and adversely affect the success of the group. The solution is for the group to deal with its conflict constructively, before it becomes embedded, spreads and erodes the foundation to the point where the group cannot carry on any longer.

## Moving Ahead

Farming can be an isolating profession, with solitary hours spent problem-solving challenges. The opportunity to connect with other producers who may face common issues can be an invigorating experience. There's value, power and comfort in knowing you're not alone in what you do, and other like-minded producers are readily available to help, whether it's through problem-solving, offering support or lending an ear. With the tips and ideas in this document, you can be well on your way to creating your own successful producer peer group!

# Sample peer group charter

*\*Please note that we strongly encourage each group to build their own charter.*



## Mission and vision

**Mission:** Drawing on experience and with integrity, the group provides a forum for progressive businesses to share knowledge that helps to advance business interests and achieve personal, family and business goals.

**Vision:** Leading ourselves to fostering excellence in farm business management.

We will accomplish this vision by obtaining confirmation from participants that they are making progress on their business, personal and family goals.

## Our relationships

- Group members are sensitive to relationships within the group and within the broader constituency of agriculture.
- Positive relationships allow us to leverage the knowledge and expertise of others in our individual undertakings.
- Members are expected to make positive contributions to the greater benefit of the peer group.
- Members are working together to find a solution or a better way, while respecting differences in individuals and opinions.
- If you would like to connect with the facilitator for anything outside the peers groups, please enter into an agreement with them. The peer group contracts the facilitator to facilitate the peer groups within the scope of their contract. Anything outside of the facilitation would not be covered. Please be mindful and pay them for their time appropriately.

## Membership expectations

- Attend all meetings.
- Be completely present at meetings without distractions or interruption. It is understood that a member may need to attend virtually or with a mobile device, and this is OK as long as the connection is good, allows for full participation and isn't disruptive to the group.
- Actively participate in meetings (in discussion, sharing management practices, sharing experiences and accepting feedback).
- Provide information in an accessible, consistent and timely manner.
- Uphold three fundamental values: trust, respect and confidentiality.

## Meeting details

- Meetings will not be recorded.
- The group is open to rescheduling a meeting if any member has a conflict with the meeting time and is unable to attend.
- E-mail and cell phone information may be shared within the group so that members may reach out to other members between meetings, and a WhatsApp group chat may be created for maintaining connections between meetings.