

A woman wearing a red long-sleeved top and a patterned skirt is reaching up to touch the leaves of a tree. She is looking upwards with a smile. The background is filled with green foliage.

# Lead Farmer Workbook

Year One



**TREES  
FOR THE  
FUTURE**



Forest Garden  
Training Center



# TREES FOR THE FUTURE

## Lead Farmer Workbook YEAR ONE

Lead Farmer Name	
Project	
Farmer Group Name	
Phone number	

### About this Booklet

Welcome to the Lead Farmer Reporting Workbook. This booklet is intended for use by Trees for the Future (TREES) Lead Farmers to standardize field procedures in reporting.

This guide contains templates and instructions to be used by Lead Farmers when conducting a specific activity:

- Farmer Contact List
- Farmer Evaluations by Lead Farmer
- Materials and Equipment Distribution Record

- Monthly Site Report

## General Instructions for Lead Farmers:

### Your role as a Lead Farmer

Lead Farmers are a key part of our training and extension approach. Lead Farmers are committed, enthusiastic community leaders who demonstrate an interest in the sustainable development of their community. Lead Farmers are not TREES employees. They are group members and project participants, selected by the technician with recommendation from the farmer group members, and act as a conduit between TREES and the community. Lead Farmers maintain close communication with technicians and their group members. They often host and assist with facilitation of training events and are responsible for visiting each participant in their group regularly to deliver planting materials and equipment, provide technical support, and compile monitoring and reporting data.

### Lead Farmer Responsibilities

- Support and liaise between TREES' technicians and participant farmers within each farmer group.
- Attend all community and training events and meetings as requested by TREES technicians.
- Host and assist with facilitation of training events as needed.
- Visit each group member regularly to deliver planting materials and equipment, and provide monitoring.
- Provide regular technical support and guidance to group members.
- Collect, compile, and submit M&E data to the project technicians

### How often to visit farmers

Ideally, Lead Farmers should visit each farmer in their group once after every workshop, though this may not always be possible. For some workshops (Nursery, Outplanting, Permagarden), there are two scheduled visits. Monthly Site Visit Records should be filled in on a monthly basis, or as required by Technicians. For some monitoring activities, and where farmers and lead farmers both have smart phones, farmers can send pictures of their completed activities in place of in-person visits.

### How and what to communicate with technicians

Information from workshop follow-up can be shared with technicians during monthly Lead Farmer meetings. However, if there are any major concerns (for

example, if many farmers are not receiving supplies or completing important activities such as establishing nurseries or outplanting) then these should be communicated to technicians as soon as possible via call or text. Additionally, for some workshop follow ups, there is a remote communication option to send technicians photos from the farmer's assignment. This will help you and technicians provide the best extension support to the farmer.



## Farmer Contact List and Workshop Attendance

	Farmer Name	Contact	Workshop Attendance					
			1	2	3	4	5	6
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2								
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## Farmer Evaluations by Lead Farmer

### What are Farmer Evaluations?

Lead Farmers are responsible for monitoring the activities and progress of farmers in their group, and reporting back to the Technicians. This evaluation form, when filled for a given event or milestone, provides a quick snapshot of the progress of each farmer in the group, and of the group as a whole. When Lead Farmers, Technicians, or other team members are conducting extension or monitoring activities with farmers in the group, this sheet will be useful in determining who in a group might need extra support, or components a given farmer may be struggling with. This simple evaluation system allows for targeted support and extension while minimizing the effort required to complete it.

### Instructions for filling out the Farmer Evaluations

Following each training event or important milestone in Forest Garden establishment, the Lead Farmer will check in on each of their farmers, either in person or (where relevant and possible) through photos sent on smart phones. Based on their observations of each farmer's progress, the Lead Farmer will cross-check the evaluation criteria for each event (listed below the evaluation table), and will give each farmer a score based on the criteria. In many cases, the evaluation criteria consist of a given checklist. The Lead Farmer will count the components that a farmer has completed, following the checklist, then write their score based on the scoring criteria given.

The scoring sheet also allows for a follow-up visit to be conducted if a farmer receives a low score and needs more time to establish a component fully. In this case, the Lead Farmer would cross out the number in the '1<sup>st</sup>' column and write the updated score in the '2<sup>nd</sup>' column under the related training event or milestone.

### When should this be done?

Each evaluation training event or milestone, for which the Lead Farmer is expected to evaluate their farmers, is listed in the instructions below the evaluation table. Immediately after the name of each event or milestone is the 'Timing of Evaluation' which tells the Lead Farmer when it needs to be completed.

### When is it shared with Technicians?

The Lead Farmer will send a photo of their evaluation sheet to the project technicians after having evaluated the farmer's in her/his group.



[illegible]



## Planning

**Timing of Evaluation:** During Forest Garden Design Workshop

SCORING	Evaluation Indicators used for Scoring
4	The farmer has completed all 8 elements of the Planning Checklist
3	The farmer has completed 5 or more elements of the Planning Checklist
2	The farmer has begun planning but with fewer than half of the elements of the Planning Checklist
1	Planning has not been started

### Planning Checklist

1. Planning calendar
2. Market analysis calendar
3. Fruit trees for market
4. Fruit trees for family/nutrition
5. Vegetables for market
6. Vegetables for family/nutrition
7. Lean season products
8. Priority market products

## Forest Garden Design

**Timing of Evaluation:** Prior to Nursery Establishment (can be during compost check)

SCORING	Evaluation Indicators used for Scoring
4	The farmer has a completed design that includes all 10 elements in the Forest Garden Design checklist
3	A design has been created that has 6 or more of Forest Garden design elements
2	A design has been created but with 5 or fewer of the design elements
1	Forest Garden Design has not been started

### Forest Garden Design Checklist

1. Priority crops identified in Module 1
2. Green Wall
3. Earthworks (if needed)
4. 10m x 10m Permagarden
5. 2 compost pits/piles
6. Alleys or Contours
7. Fruit tree segment
8. Timber tree segment
9. Gated entrance
10. Tree nursery

## Compost

**Timing of Evaluation:** Prior to Nursery Establishment (Farmers can send photos to Lead Farmer instead of in-person visits if possible)

SCORING	Evaluation Indicators used for Scoring
4	The farmer has two or more active pits (2m long) or piles (1m tall), built in layers and covered with a moisture barrier. Piles may have a stick.
3	First compost complete and second is under construction.
2	First compost is under construction
1	No actively managed compost piles

## Nursery Establishment

**Timing of Evaluation:** As soon as nurseries are scheduled to be established

SCORING	Evaluation Indicators used for Scoring
4	The nursery is fully established with all 7 elements of the Nursery Checklist in place
3	The nursery has been established with 4 or more of the 7 elements of the Nursery Checklist in place
2	The nursery has been started but with 3 or fewer elements of the Nursery Checklist in place
1	Nursery establishment has not begun

### Nursery Checklist

1. Good water accessibility
2. Protection from animals/damage
3. Space for the target number of seedlings (per farmer)
4. Bareroot beds double dug and amended
5. Tree sack section
6. Shading constructed over bareroot beds and tree sack section
7. Use of good soil mix for tree sacks

## Germination

**Timing of Evaluation:** After germination (usually 3 to 4 weeks after sowing)

SCORING	Evaluation Indicators used for Scoring
4	The full number of target seedlings have germinated and are growing in the nursery
3	Not all, but more than half of the target number of seedlings are growing in nursery
2	Fewer than half of the target number of seedlings are growing in nursery
1	Few to no seedlings are growing in nursery

## Permagardening (First Visit)

**Timing of Evaluation:** 1 month after permagardening training

SCORING	Evaluation Indicators used for Scoring
4	Permagarden is established with 11 elements of the Permagarden Checklist (first visit) in place
3	Permagarden is established with 6 or more of the Permagarden Checklist (first visit) in place
2	The Permagarden has been started but with 5 or fewer of the Permagarden Checklist (first visit) elements in place
1	Permagarden area is not established

#### Permagardening Checklist (First visit)

1. Area selected is approximately 10m x 10m in size
2. At least 3 sunken or raised beds
3. At least 3 of the beds are double-dug (more to be dug over time)
4. Erosion control measures/earthworks (if needed)
5. Vegetable nursery bed
6. Sufficient use of compost/amendments
7. Diverse primary products selected for nutrition and marketing
8. Use of companions for soil fertility
9. Use of companions for IPM
10. Triangular spacing / correct spacing
11. Beds are covered with mulch

#### Permagardening (Second Visit)

**Timing of Evaluation:** 4 months after permagardening training

SCORING	Evaluation Indicators used for Scoring
4	Permagarden displays 10 elements of the Permagarden Checklist (second visit)
3	Permagarden displays 6 or more elements of the Permagarden Checklist (second visit)
2	Permagarden displays 5 or fewer of the Permagarden Checklist (second visit) elements
1	None of the Permagarden Checklist (second visit) elements are displayed

#### Permagardening Checklist (second visit)

1. Relay planting is practiced, adding 3 or more additional beds
2. Beds are amended prior to planting/replanting
3. Protective border is planted (green wall/windbreak)
4. Productive border is planted with perennials
5. Use of IPM solutions and principles
6. Use of companions for soil fertility
7. Use of companions for IPM
8. Triangular spacing / correct spacing
9. Beds are covered with mulch
10. Seed saving/safe storage is practiced

#### Trees Planted

**Timing of Evaluation:** As soon as possible after outplanting is complete

SCORING	Evaluation Indicators used for Scoring
4	At least 2,000 seedlings are planted in Forest Garden
3	Between 1,000 and 2,000 seedlings are planted in the Forest Garden
2	Fewer than 1,000 seedlings are planted in the Forest Garden
1	Few to no seedlings are planted in the Forest Garden

## Outplanting

**Timing of Evaluation:** At the same time as the 'Trees Planted' evaluation

SCORING	Evaluation Indicators used for Scoring
4	All 5 of the outplanting elements have been started
3	At least 4 of the outplanting elements have been started
2	3 or fewer of the outplanting elements have been started
1	Outplanting has not begun

### Outplanting Checklist

1. Green Wall
2. Alleys or Contours
3. Fruit tree segment
4. Timber tree segment
5. Dead/stick fence

## Materials and Equipment Distribution List

This form records all seed or seedlings, equipment, tools, and materials distributed to farmers.

### What is collected?

Each item distributed (for example one type of seed, one type of seedling, a water can, a wheel barrow, etc) will have it's own section. Two different items can be recorded on each page. Fill in the name or description of the item, and the amount (quantity) received in the appropriate columns. The farmer or Technician will write the farmer's name, and the farmer will sign and date it. The Technician who is distributing the item(s) must also sign for each item distributed under the 'Description' in the column on the left.

### When should this be done?

Every time materials are distributed.

### When is it shared with Technicians?

At the next monthly Tech–Lead Farmer meeting.



*Farmers must give their signature and the date on which they receive any material or equipment.*

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Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
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## Monthly Site Visit Record

### Instructions:

- Each farmer in the group should have her/his own Monthly Site Visit Record sheet (two pages).
- Write the farmer's name at the top of each record, along with the farmer group and project.
- Each time a farmer's site is visited, write the date of the visit, and have the farmer sign the form.
- If there are trees in the nurseries, list all tree species and the number for each that you observe growing in the **nursery**.
- For months when outplanted trees are to be counted, list **Newly planted trees** for the month visited, broken down by the type of planting (e.g. alleys, green walls, fruit, etc)
- Record all current **pests and diseases** affecting the trees or vegetables in a given month, and applied or possible solutions.
- Record any soil or water-related issues relevant in the farmer's nursery or forest garden, any questions, comments, or notes, and any innovations observed, recommendations, or problems solved.

### When is data collected?

The Monthly Site Visit form is designed to be filled monthly. If there is any change, it should be indicated by the project Technicians.

### When is it shared with technicians?

At the next monthly Tech–Lead Farmer meeting.



***Print and include one Monthly Site Visit Record sheet (two pages) for each farmer in the group, and add them to the Lead Farmer Workbook.***

## Monthly Site Visit Record

**Farmer's  
Name:**

**Farmer Group:**

**Project:**[illegible]

Fruit trees												
Timber trees												
Scattered												
Other:												
Other:												
<b>Pests and Diseases (Name and tick/check where appropriate)</b>												
1												
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4												
5												
<i>For the following 3 notes sections, write date next to comment</i>												
<b>Soil and Water Problems</b>												
<b>Farmer Questions/ Comments/ Notes</b>												
<b>Innovations / recommendations / problems solved</b>												

# Lead Farmer Workbook—Year 1

<b>Lead Farmer Name</b>	
<b>Project</b>	
<b>Farmer Group Name</b>	
<b>Phone number</b>	



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### *Lead Farmer Responsibilities*

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- Attend all community and training events and meetings as requested by TREES technicians.
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- Provide regular technical support and guidance to group members.
- Collect, compile, and submit M&E data to the project technicians

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### How and what to communicate with technicians

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### List of Workshops

Write the workshops given and dates below, in the order they were given (to be used for Workshop Attendance below):

No.	WORKSHOP NAME	WORKSHOP DATE
1.		
2.		
3.		
4.		
5.		
6.		

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The scoring sheet also allows for a follow-up visit to be conducted if a farmer receives a low score and needs more time to establish a component fully. In this case, the Lead Farmer would cross out the number in the '1<sup>st</sup>' column and write the updated score in the '2<sup>nd</sup>' column under the related training event or milestone.

### When should this be done?

Each evaluation training event or milestone, for which the Lead Farmer is expected to evaluate their farmers, is listed in the instructions below the evaluation table. Immediately after the name of each event or milestone is the 'Timing of Evaluation' which tells the Lead Farmer when it needs to be completed.

### When is it shared with Technicians?

The Lead Farmer will send a photo of their evaluation sheet to the project technicians after having evaluated the farmer's in her/his group.

## Evaluation Scoring Form #1

No.	LF Name:  Group Name:	Planning		FG Design		Compost		Permagarden (1 <sup>st</sup> visit)		Permagarden (2 <sup>nd</sup> visit)	
		1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>
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## Evaluation Scoring Form #2

No.	LF Name:  Group Name:	Nursery establishment		Trees in nursery (germination)		Trees planted		Outplanting	
		1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>
	Farmer Name								
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## Evaluation Scoring Form (Second Rainy Season)

No.	LF Name:	Nursery Establishment		Trees in nursery (Germination)		Trees planted		Outplanting	
	Group Name:	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>
	Farmer Name								
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## NOTES



## NOTES

## Planning

**Timing of Evaluation:** During Forest Garden Design Workshop

SCORING	Evaluation Indicators used for Scoring
4	The farmer has completed all 8 elements of the Planning Checklist
3	The farmer has completed 5 or more elements of the Planning Checklist
2	The farmer has begun planning but with fewer than half of the elements of the Planning Checklist
1	Planning has not been started

### Planning Checklist

1. Planning calendar
2. Market analysis calendar
3. Fruit trees for market
4. Fruit trees for family/nutrition
5. Vegetables for market
6. Vegetables for family/nutrition
7. Lean season products
8. Priority market products

## Forest Garden Design

**Timing of Evaluation:** Prior to Nursery Establishment

SCORING	Evaluation Indicators used for Scoring
4	The farmer has a completed design that includes all 10 elements in the Forest Garden Design checklist
3	A design has been created that has 6 or more of Forest Garden design elements
2	A design has been created but with 5 or fewer of the design elements
1	Forest Garden Design has not been started

### Forest Garden Design Checklist

1. Priority crops identified in Module 1
2. Green Wall
3. Earthworks (if needed)
4. 10m x 10m Permagarden
5. 2 compost pits/piles
6. Alleys or Contours
7. Fruit tree segment
8. Timber tree segment
9. Gated entrance
10. Tree nursery

## Compost

**Timing of Evaluation:** 3 to 4 weeks after Compost training (Farmers can send photos to Lead Farmer instead of in-person visits if possible)

SCORING	Evaluation Indicators used for Scoring
4	The farmer has two or more active pits (2m long) or piles (1m tall), built in layers and covered with a moisture barrier. Piles may have a stick.
3	First compost complete and second is under construction.
2	First compost is under construction
1	No actively managed compost piles

## Nursery Establishment

**Timing of Evaluation:** As soon as nurseries are scheduled to be established

SCORING	Evaluation Indicators used for Scoring
4	The nursery is fully established with all 7 elements of the Nursery Checklist in place
3	The nursery has been established with 4 or more of the 7 elements of the Nursery Checklist in place
2	The nursery has been started but with 3 or fewer elements of the Nursery Checklist in place
1	Nursery establishment has not begun

### Nursery Checklist

1. Good water accessibility
2. Protection from animals/damage
3. Space for the target number of seedlings (per farmer)
4. Bareroot beds double dug and amended
5. Tree sack section
6. Shading constructed over bareroot beds and tree sack section
7. Use of good soil mix for tree sacks

## Trees in Nursery (Germination)

**Timing of Evaluation:** After germination (usually 3 to 4 weeks after sowing)

SCORING	Evaluation Indicators used for Scoring
4	The full number of target seedlings have germinated and are growing in the nursery
3	Not all, but more than half of the target number of seedlings are growing in nursery
2	Fewer than half of the target number of seedlings are growing in nursery
1	Few to no seedlings are growing in nursery

## Permagardening (First Visit)

**Timing of Evaluation:** 1 month after permagardening training

SCORING	Evaluation Indicators used for Scoring
4	Permagarden is established with 11 elements of the Permagarden Checklist (first visit) in place
3	Permagarden is established with 6 or more of the Permagarden Checklist (first visit) in place
2	The Permagarden has been started but with 5 or fewer of the Permagarden Checklist (first visit) elements in place
1	Permagarden area is not established

### Permagardening Checklist (First visit)

1. Area selected is approximately 10m x 10m in size
2. At least 3 sunken or raised beds
3. At least 3 of the beds are double-dug (more to be dug over time)
4. Erosion control measures/earthworks (if needed)
5. Vegetable nursery bed
6. Sufficient use of compost/amendments
7. Diverse primary products selected for nutrition and marketing
8. Use of companions for soil fertility
9. Use of companions for IPM
10. Triangular spacing / correct spacing
11. Beds are covered with mulch

## Permagardening (Second Visit)

**Timing of Evaluation:** 4 months after permagardening training

SCORING	Evaluation Indicators used for Scoring
4	Permagarden displays 10 elements of the Permagarden Checklist (second visit)
3	Permagarden displays 6 or more elements of the Permagarden Checklist (second visit)
2	Permagarden displays 5 or fewer of the Permagarden Checklist (second visit) elements
1	None of the Permagarden Checklist (second visit) elements are displayed

### Permagardening Checklist (second visit)

1. Relay planting is practiced, adding 3 or more additional beds
2. Beds are amended prior to planting/replanting
3. Protective border is planted (green wall/windbreak)
4. Productive border is planted with perennials
5. Use of IPM solutions and principles
6. Use of companions for soil fertility
7. Use of companions for IPM
8. Triangular spacing / correct spacing
9. Beds are covered with mulch
10. Seed saving/safe storage is practiced

## Trees Planted

**Timing of Evaluation:** As soon as possible after outplanting is complete

SCORING	Evaluation Indicators used for Scoring
4	Target number of seedlings are planted in Forest Garden
3	More than half of the target seedlings are planted in the Forest Garden
2	Fewer than half of the target seedlings are planted in the Forest Garden
1	Few to no seedlings are planted in the Forest Garden

## Outplanting

**Timing of Evaluation:** At the same time as the 'Trees Planted' evaluation

SCORING	Evaluation Indicators used for Scoring
4	At least two rows of the Green Wall are completed
3	Two rows of the Green Wall are each at least 50% (half) complete
2	One or more rows of the Green Wall is started but is less than 50% (half) complete
1	Green Wall has not been planted

## Materials and Equipment Distribution List

This form records all seed or seedlings, equipment, tools, and materials distributed to farmers.

### What is collected?

Each item distributed (for example one type of seed, one type of seedling, a water can, a wheel barrow, etc) will have it's own section. Two different items can be recorded on each page. Fill in the name or description of the item, and the amount (quantity) received in the appropriate columns. The farmer or Technician will write the farmer's name, and the farmer will sign and date it. The Technician who is distributing the item(s) must also sign for each item distributed under the 'Description' in the column on the left.

### When should this be done?

Every time materials are distributed.

### When is it shared with Technicians?

At the next monthly Tech–Lead Farmer meeting.



*Farmers must give their signature and the date on which they receive any material or equipment.*

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## Monthly Site Visit Record

### Instructions:

- Each farmer in the group should have her/his own Monthly Site Visit Record sheet (two pages).
- Write the farmer's name at the top of each record, along with the farmer group and project.
- Each time a farmer's site is visited, write the date of the visit, and have the farmer sign the form.
- If there are trees in the nurseries, list all tree species and the number for each that you observe growing in the **nursery**.
- For months when outplanted trees are to be counted, list **Newly planted trees** for the month visited, broken down by the type of planting (e.g. alleys, green walls, fruit, etc)
- Record all current **pests and diseases** affecting the trees or vegetables in a given month, and applied or possible solutions.
- Record any issues relevant in the farmer's nursery or forest garden, any questions, comments, or notes, and any innovations observed, recommendations, or problems solved.

### When is data collected?

The Monthly Site Visit form is designed to be filled monthly. If there is any change, it should be indicated by the project Technicians.

### When is it shared with technicians?

At the next monthly Tech–Lead Farmer meeting.



***Print and include one Monthly Site Visit Record sheet (two pages) for each farmer in the group, and add them to the Lead Farmer Workbook.***



Monthly Site Visit Record												
Farmer's Name:				Farmer Group:				Project:				
MONTH	Jan	Feb	March	April	May	June	July	August	Sept	October	Nov	Dec
Visit Date												
Farmer Signature												
Tree Species in Nursery	#	#	#	#	#	#	#	#	#	#	#	#
1												
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Number Newly Planted Trees	#	#	#	#	#	#	#	#	#	#	#	#
Green wall												
Alleys												
Contours												

Fruit trees												
Timber trees												
Scattered												
Other:												
Other:												
<b>Pests and Diseases (Name and tick/check where appropriate)</b>												
1												
2												
3												
4												
5												
<b>For the following 3 notes sections, write date next to comment</b>												
<b>Issues farmers face</b>												
<b>Farmer Questions/ Comments/ Notes</b>												
<b>Innovations / recommendations / problems solved</b>												

## VISITOR SIGN-IN SHEET

**Date**

**Name of Visitor(s)**

**Signature**

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## VISITOR SIGN-IN SHEET

**Date**

**Name of Visitor(s)**

**Signature**

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## VISITOR SIGN-IN SHEET

**Date**

**Name of Visitor(s)**

**Signature**

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## VISITOR SIGN-IN SHEET

**Date**

**Name of Visitor(s)**

**Signature**

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