Lead Farmer Workbook

Year Two

TREES FOR THE FUTURE

Forest Garden Training Center

TREES FOR THE FUTURE

Lead Farmer Workbook
YEAR TWO

Lead Farmer Name	
Project	
Farmer Group Name	
Phone number	

About this Booklet

Welcome to the Year 2 Lead Farmer Reporting Workbook. This booklet is intended for use by Trees for the Future (TREES) Lead Farmers to standardize field procedures in reporting. The Year 2 version is similar to Year 1, with only some additions to the Lead Farmer Evaluation responsibilities. The procedures for filling in the information remains the same.

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.

Table of Contents

Farmer Contact List and Workshop Attendance

	Farmer Name	Contact	Workshop Attendance					
			1	2	3	4	5	6
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30								

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. When visiting a farmer in the group, the Lead Farmer will closely observe the elements in question for a component of the Forest Garden. They will cross-check the evaluation criteria or checklist for each component (listed below the evaluation table), as during their observations and discussion with the farmer. In some cases there is no checklist so the Lead Farmer simply follows the scoring criteria to give a score. When there is a checklist, s/he will count the components that a farmer has completed, following the checklist, then write their score based on the scoring criteria.

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 '1st' column and write the updated score in the '2nd' column under the related training event or milestone.

Timing of Evaluations

The timing for each evaluation (i.e. when the evaluation should be conducted) is noted above the scoring table for each component.

When is it shared with Technicians?

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

*NOTE that the order of the form and checklists below may not follow the order that they are to be conducted in your project.

Evaluation Scoring Form #1

No.	LF Name: Group Name: **Farmer Name**	Review, Planning, & Optimization		Compost		Nursery Establishment		Germination		Permagarden (1st visit)		Permagarden (2nd visit)	
		1st	2nd	1st	2nd	1st	2nd	1st	2nd	1st	2nd	1st	2nd
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30													

Evaluation Scoring Form #2

No.	LF Name: Group Name: Farmer Name	Trees Planted		Ouplanting		Pruning & Harvesting		IPM		Seed Saving		Water Conservation	
		1st	2nd	1st	2nd	1st	2nd	1st	2nd	1st	2nd	1st	2nd
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30													

Evaluation Criteria & Scoring for Form #1

Review, Planning, and Optimization

Timing of Evaluation – one month after training event

SCORING	Evaluation Indicators Used for Scoring
4	The farmer has completed all 5 elements of the checklist
3	The farmer has completed 3 or more elements of the checklist
2	The farmer has begun review and planning but with fewer than 3 of the elements complete
1	Review and planning has not been started

Review, Optimization and Planning Checklist

1. Top view map (from Year 1) is updated
2. Side view map is sketched out in Farmers Workbook
3. Tree Nursery Planning chart is complete in Farmers Workbook
4. Seed Planning chart is complete in Farmers Workbook
5. Crop Rotation chart is complete in Farmers Workbook

Compost

Timing of Evaluation: One month before the rainy season (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. Nursery site has good water accessibility
2. Nursery is protected from animals/damage
3. There is enough space for the target number of seedlings (per farmer)
4. Bareroot beds are double dug and amended
5. There is a section built for tree sacks
6. Shading is 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: Two to four weeks after gardening season begins

SCORING	Evaluation Indicators Used for Scoring
4	Permagarden is established with 12 elements of the Permagarden Checklist (first visit) in place
3	Permagarden is established with 7 or more of the Permagarden Checklist (first visit) in place
2	The Permagarden has been started but with 6 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 at least 10m x 10m in size
2. At least 6 sunken or raised beds
3. At least 6 of the beds are double-dug
4. Farmer has applied erosion control measures/earthworks (if needed)
5. Farmer is using a vegetable nursery bed where needed
6. Farmer is using rotation, planting plots with different crop families from previous season
7. Sufficient use of compost/amendments
8. Diverse primary products selected for nutrition and marketing
9. Use of companions for soil fertility
10. Use of companions for IPM
11. Triangular spacing / correct spacing
12. Beds are covered with mulch

Permagardening (Second Visit)

Timing of Evaluation: Three months after gardening season begins

SCORING	Evaluation Indicators Used for Scoring
4	Permagarden displays 11 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 (succession) planting is practiced, adding 3 or more additional beds
2. Beds are amended prior to planting/replanting
3. Farmer is using crop rotation
4. Protective border is planted around the permagarden (green wall/windbreak)
5. Productive border is planted with perennials
6. Use of IPM solutions and principles
7. Use of companions for soil fertility
8. Use of companions for IPM
9. Triangular spacing / correct spacing
10. Beds are covered with mulch
11. Seed saving/safe storage is practiced

Evaluation Criteria & Scoring for Form #1

Trees Planted

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

SCORING	Evaluation Indicators Used for Scoring
4	Target trees are planted in the farmer's Forest Garden for this season
3	At least half of the farmer's target number of seedlings for this season are planted in the Forest Garden
2	Fewer than half of the target number of seedlings for this season are planted in the Forest Garden
1	Few to no seedlings have been planted yet this season 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 4 of the outplanting elements are in place
3	At least 3 of the outplanting elements have been started
2	2 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. Hardwood tree segment

Pruning & Harvesting

Timing of Evaluation – at the end of the dry season

SCORING	Evaluation Indicators Used for Scoring
4	The farmer has completed all 7 elements of the checklist
3	The farmer has completed 4 or more elements of the checklist
2	The farmer has begun practicing pruning but has completed fewer than 3
1	The farmer has not yet begun pruning

Pruning Checklist

1. Unhealthy branches in Forest Garden are pruned
2. Green Wall terminal buds are pruned (except in windbreak line)
3. Side branches are woven into Green Wall, with excess branches pruned
4. Slow growing trees in the nursery are pruned for form and health
5. Trees in alleys and contours are pruned
6. Green manure is applied to the field
7. Correct pruning practices used all around (clean cuts; limited breakage or tearing)

Integrated Pest Management (IPM)

Timing of Evaluation – one month after training event (during annual crop/garden cultivation)

SCORING	Evaluation Indicators Used for Scoring
4	The farmer has completed all 5 elements of the checklist
3	The farmer has completed 3 or more elements of the checklist
2	The farmer has begun practicing IPM but with fewer than 3 of the elements complete
1	IPM practices have not yet been used

IPM Checklist

1. Regularly scouts Forest Garden for pests (farmer can explain how they scout, what they have found, and what they have applied to address problems)
2. Ensures crop health through use of compost and other natural soil fertility measures
3. Demonstrated use of companion planting to repel pests or attract pest predators
4. Practices crop rotation, in permagarden or elsewhere (farmer can explain the rotation(s) they use)
5. Created and applied a natural pesticide in their Forest Garden

Seed Saving

Timing of Evaluation – one month after rainy season ends

SCORING	Evaluation Indicators Used for Scoring
4	The farmer has completed all 5 elements of the checklist
3	The farmer has completed 3 or more elements of the checklist
2	The farmer has begun saving seeds but with fewer than 3 of the elements complete
1	The farmer has not started seed saving

Saving Checklist

1. Farmer collected and is saving tree seeds at their home
2. Farmer collected and is saving vegetable seeds at their home
3. Farmer is using air-tight containers for seeds, stored in a cool, dry place
4. Seeds are labeled with species, location of harvest, and date
5. Seeds were properly dried, cleaned, and sorted

Water Conservation

Timing of Evaluation – at the start of the rainy season (OR one month after training)

SCORING	Evaluation Indicators Used for Scoring
4	The farmer has completed all 3 elements of the checklist
3	The farmer has completed 2 elements of the checklist
2	The farmer has completed 1 element of the checklist
1	The farmer has not practiced water conservation practices

Water Conservation Checklist

1. Demonstrated use of mulch on all vegetable beds and fruit trees
2. Demonstrated use of cuvettes and/or half-moon berms around fruit trees
3. Established vegetative strips or berms and swales along contours of erosion-prone areas

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.

Project:			Lead Farmer:				Farmer Group:			
Item		**Farmer Name**	**#**	**Farmer Signature**	**Date**		**Farmer Name**	**#**	**Farmer Signature**	**Date**
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				
Item		**Farmer Name**	**#**	**Farmer Signature**	**Date**		**Farmer Name**	**#**	**Farmer Signature**	**Date**
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				
Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
	1					16				
	2					17				
Description:	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
	1					16				
	2					17				
Description:	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				
Item		**Farmer Name**	**#**	**Farmer Signature**	**Date**		**Farmer Name**	**#**	**Farmer Signature**	**Date**
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				
Item		**Farmer Name**	**#**	**Farmer Signature**	**Date**		**Farmer Name**	**#**	**Farmer Signature**	**Date**
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				
Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

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 the most common or destructive **pests and diseases** affecting the trees or vegetables, marking when they are present, and the applied or possible solutions.
- Record any issues or challenges 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

	MONTH	Jan	Feb	March	April	May	June	July	August	Sept	October	Nov	Dec
Farmer's Name:					**Farmer Group:**				**Project:**			
Visit Date													
Farmer Signature													
Tree Species in Nursery	#	#	#	#	#	#	#	#	#	#	#	#
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
Number Newly Planted Trees	#	#	#	#	#	#	#	#	#	#	#	#
Green wall													
Alleys													
Contours													

Fruit trees														
Timber trees														
Scattered														
Other:														
Other:														

Pests and Diseases (Name and tick/check where appropriate)

1														
2														
3														
4														
5														

For the following 3 notes sections, write date next to comment

Issues or Challenges that Group Farmers are facing	
Farmer Questions/ Comments/ Notes	
Innovations / recommendations / problems solved	

Lead Farmer Workbook—Year 2

Lead Farmer Name	
Project	
Farmer Group Name	
Phone number	

About this Booklet

Welcome to the Year 2 Lead Farmer Reporting Workbook. This booklet is intended for use by Trees for the Future (TREES) Lead Farmers to standardize field procedures in reporting. The Year 2 version is similar to Year 1, with only some additions to the Lead Farmer Evaluation responsibilities. The procedures for filling in the information remains the same.

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 farmer group members and technicians, 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.

- 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.

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.		

Farmer Contact List and Workshop Attendance

	Farmer Name	Contact	Workshop Attendance					
			1	2	3	4	5	6
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30								

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. When visiting a farmer in the group, the Lead Farmer will closely observe the elements in question for a component of the Forest Garden. They will cross-check the evaluation criteria or checklist for each component (listed below the evaluation table), as during their observations and discussion with the farmer. In some cases there is no checklist so the Lead Farmer simply follows the scoring criteria to give a score. When there is a checklist, s/he will count the components that a farmer has completed, following the checklist, then write their score based on the scoring criteria.

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 '1st' column and write the updated score in the '2nd' column under the related training event or milestone.

Timing of Evaluations

The timing for each evaluation (i.e. when the evaluation should be conducted) is noted above the scoring table for each component.

When is it shared with Technicians?

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

*NOTE that the order of the form and checklists below may not follow the order that they are to be conducted in your project.

Evaluation Scoring Form #1

No.	LF Name: Group Name: Farmer Name	Review, Planning, & Optimization		Compost		Nursery Establishment		Trees in Nurseries (Germination)		Permagarden (1st visit)		Permagarden (2nd visit)	
		1st	2nd	1st	2nd	1st	2nd	1st	2nd	1st	2nd	1st	2nd
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30													

Evaluation Scoring Form #2

No.	LF Name: Group Name: Farmer Name	Trees Planted		Ouplanting		Pruning & Harvesting		IPM		Seed Saving		Water Conservation	
		1st	2nd	1st	2nd	1st	2nd	1st	2nd	1st	2nd	1st	2nd
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30													

Evaluation Scoring Form (Second Rainy Season)

No.	LF Name: Group Name: Farmer Name	Nursery Establishment		Trees in nursery (Germination)		Trees planted		Outplanting	
		1st	2nd	1st	2nd	1st	2nd	1st	2nd
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30									

NOTES

NOTES

Evaluation Criteria & Scoring for Form #1

REVIEW, PLANNING, & OPTIMIZATION

Timing of Evaluation – one month after training event

SCORING	Evaluation Indicators Used for Scoring
4	The farmer has completed all 5 elements of the checklist
3	The farmer has completed 3 or more elements of the checklist
2	The farmer has begun review and planning but with fewer than 3 of the elements complete
1	Review and planning has not been started

Review, Optimization and Planning Checklist

1. Top view map (from Year 1) is updated
2. Side view map is sketched out in Farmers Workbook
3. Tree Nursery Planning chart is complete in Farmers Workbook
4. Seed Planning chart is complete in Farmers Workbook
5. Crop Rotation chart is complete in Farmers Workbook

COMPOST

Timing of Evaluation: Should be measured twice in the year: before nurseries are started, and before permagardens are planted (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 pit/pile complete and second is under construction.
2	First compost pit/pile 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. Nursery site has good water accessibility
2. Nursery is protected from animals/damage
3. There is enough space for the target number of seedlings (per farmer)
4. Bareroot beds are double dug and amended
5. There is a section built for tree sacks
6. Shading is constructed over bareroot beds and tree sack section
7. Use of good soil mix for tree sacks

TREES IN NURSERIES - 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: Two to four weeks after gardening season begins

SCORING	Evaluation Indicators Used for Scoring
4	Permagarden is established with 12 elements of the Permagarden Checklist (first visit) in place
3	Permagarden is established with 7 or more of the Permagarden Checklist (first visit) in place
2	The Permagarden has been started but with 6 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 at least 10m x 10m in size
2. At least 6 sunken or raised beds
3. At least 6 of the beds are double-dug
4. Farmer has applied erosion control measures/earthworks (if needed)
5. Farmer is using a vegetable nursery bed where needed
6. Farmer is using rotation, planting plots with different crop families from previous season
7. Sufficient use of compost/amendments
8. Diverse primary products selected for nutrition and marketing
9. Use of companions for soil fertility
10. Use of companions for IPM
11. Triangular spacing / correct spacing
12. Beds are covered with mulch

PERMAGARDENING (Second Visit)

Timing of Evaluation: Three months after gardening season begins

SCORING	Evaluation Indicators Used for Scoring
4	Permagarden displays 11 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 (succession) planting is practiced, adding 3 or more additional beds
2. Beds are amended prior to planting/replanting
3. Farmer is using crop rotation
4. Protective border is planted around the permagarden (green wall/windbreak)
5. Productive border is planted with perennials
6. Use of IPM solutions and principles
7. Use of companions for soil fertility
8. Use of companions for IPM
9. Triangular spacing / correct spacing
10. Beds are covered with mulch
11. Seed saving/safe storage is practiced

Evaluation Criteria & Scoring for Form #1

TREES PLANTED

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

SCORING	Evaluation Indicators Used for Scoring
4	Target trees are planted in the farmer's Forest Garden for this season
3	At least half of the farmer's target number of seedlings for this season are planted in the Forest Garden
2	Fewer than half of the target number of seedlings for this season are planted in the Forest Garden
1	Few to no seedlings have been planted yet this season in the Forest Garden

OUPLANTING

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

SCORING	Evaluation Indicators Used for Scoring
4	All 4 of the outplanting elements are in place
3	At least 3 of the outplanting elements have been started
2	2 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. Hardwood tree segment

PRUNING & HARVESTING

Timing of Evaluation – at the end of the dry season

SCORING	Evaluation Indicators Used for Scoring
4	The farmer has completed all 7 elements of the checklist
3	The farmer has completed 4 or more elements of the checklist
2	The farmer has begun practicing pruning but has completed fewer than 3
1	The farmer has not yet begun pruning

Pruning Checklist

1. Unhealthy branches in Forest Garden are pruned
2. Green Wall terminal buds are pruned (except in windbreak line)
3. Side branches are woven into Green Wall, with excess branches pruned
4. Slow growing trees in the nursery are pruned for form and health
5. Trees in alleys and contours are pruned
6. Green manure is applied to the field
7. Correct pruning practices used all around (clean cuts; limited breakage or tearing)

INTEGRATED PEST MANAGEMENT (IPM)

Timing of Evaluation – one month after training event (during annual crop/garden cultivation)

SCORING	Evaluation Indicators Used for Scoring
4	The farmer has completed all 5 elements of the checklist
3	The farmer has completed 3 or more elements of the checklist
2	The farmer has begun practicing IPM but with fewer than 3 of the elements complete
1	IPM practices have not yet been used

IPM Checklist

1. Regularly scouts Forest Garden for pests (farmer can explain how they scout, what they have found, and what they have applied to address problems)
2. Ensures crop health through use of compost and other natural soil fertility measures
3. Demonstrated use of companion planting to repel pests or attract pest predators
4. Practices crop rotation, in permagarden or elsewhere (farmer can explain the rotation(s) they use)
5. Created and applied a natural pesticide in their Forest Garden

SEED SAVING

Timing of Evaluation – one month after rainy season ends

SCORING	Evaluation Indicators Used for Scoring
4	The farmer has completed all 5 elements of the checklist
3	The farmer has completed 3 or more elements of the checklist
2	The farmer has begun saving seeds but with fewer than 3 of the elements complete
1	The farmer has not started seed saving

Saving Checklist

1. Farmer collected and is saving tree seeds at their home
2. Farmer collected and is saving vegetable seeds at their home
3. Farmer is using air-tight containers for seeds, stored in a cool, dry place
4. Seeds are labeled with species, location of harvest, and date
5. Seeds were properly dried, cleaned, and sorted

WATER CONSERVATION

Timing of Evaluation – During the planting season (OR one month after training)

SCORING	Evaluation Indicators Used for Scoring
4	The farmer has completed all 3 elements of the checklist
3	The farmer has completed 2 elements of the checklist
2	The farmer has completed 1 element of the checklist
1	The farmer has not practiced water conservation practices

Water Conservation Checklist

1. Demonstrated use of mulch on all vegetable beds and fruit trees
2. Demonstrated use of cuvettes and/or half-moon berms around fruit trees
3. Established vegetative strips or berms and swales along contours of erosion-prone areas

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 wheelbarrow, 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.

Project:			Lead Farmer:				Farmer Group:			
Item		**Farmer Name**	**#**	**Farmer Signature**	**Date**		**Farmer Name**	**#**	**Farmer Signature**	**Date**
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				
Item		**Farmer Name**	**#**	**Farmer Signature**	**Date**		**Farmer Name**	**#**	**Farmer Signature**	**Date**
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				
Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				
Item		**Farmer Name**	**#**	**Farmer Signature**	**Date**		**Farmer Name**	**#**	**Farmer Signature**	**Date**
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				
Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				
Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

Item		Farmer Name	#	Farmer Signature	Date		Farmer Name	#	Farmer Signature	Date
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
Tech Signature:	10					25				
	11					26				
	12					27				
	13					28				
	14					29				
	15					30				
Item		**Farmer Name**	**#**	**Farmer Signature**	**Date**		**Farmer Name**	**#**	**Farmer Signature**	**Date**
Description:	1					16				
	2					17				
	3					18				
	4					19				
	5					20				
	6					21				
	7					22				
	8					23				
	9					24				
	10					25				
Tech Signature:	11					26				
	12					27				
	13					28				
	14					29				
	15					30				

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 the most common or destructive **pests and diseases** affecting the trees or vegetables, marking when they are present, and the applied or possible solutions.
- Record any issues or challenges 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												
2												
3												
4												
5												
6												
7												
8												
9												
10												
Number Newly Planted Trees	#	#	#	#	#	#	#	#	#	#	#	#
Green wall												
Alleys												
Contours												

Fruit trees												
Timber trees												
Scattered												
Other:												
Other:												
Pests and Diseases (Name and tick/check where appropriate)												
1												
2												
3												
4												
5												
For the following 3 notes sections, write date next to comment												
Issues or Challenges that Group Farmers are facing												
Farmer Questions/ Comments/ Notes												
Innovations / recommendations / problems solved												

VISITOR SIGN-IN SHEET

Date	Name of Visitor(s)	Signature

VISITOR SIGN-IN SHEET

Date	Name of Visitor(s)	Signature

VISITOR SIGN-IN SHEET

Date	Name of Visitor(s)	Signature

VISITOR SIGN-IN SHEET

Date	Name of Visitor(s)	Signature