



# *Welcome to AgVentures*

## *Building a Vision*

### Financial Management & Analysis

Following are a few **suggested guidelines** to help you when preparing to host an *AgVentures* Building a Vision Workshop Series. Should you have any questions or would like help in coordinating a workshop with the working group, please contact: Jenny Vanderlin, 608.263.7795, [jmvander@wisc.edu](mailto:jmvander@wisc.edu).

*Cost:* \$30.00 for Extension Clients  
\$50.00 for Businesses

*Prerequisites/Knowledge needed to teach module:*

- ✓ Strategic Planning Training: At least one member of teaching team
  - Further Training/Knowledge:
    - SWOT Analysis
    - Mission/Purpose Development
    - Stakeholders and Analysis
    - Strategic Issues Development and Interpretation
    - Plan of Action and Evaluation Process
  
- ✓ AgFA Training: At least one member of the teaching team should be proficient in AgFA. It is suggested that ALL of teaching team are at least familiar with AgFA. The financial analysis part of the program includes reviewing the financial performance of Bella Acres' in the AgFA report format. It is expected participants have one of the instructors help them collect their own data and an AgFA report will be ready for their use on day 2 of the series. These reports are used as the basis for teaching financial concepts related to Profitability, Solvency, Repayment Capacity, and Liquidity measures.
  - Further Training/Knowledge:
    - AgFA: Reports, Calculations Used, Data Collection Methods
    - FFSTF – “Sweet 16”
    - Basic Financial Statements: Financial Measures, Balance Sheet, Cash Flow
    - Facts that Influence Financial Measures in Financial Businesses
  
- ✓ Bella Acres: all of teaching team should review video and financials. One or two members should know financials thoroughly.
  
- ✓ Scenarios: Input of scenario information into AgFA database. This takes place in-between Workshops I&II.



- ✓ It is important to have the full teaching team at all workshops in order to help follow through on exercises, etc.
- ✓ Strong Group Facilitation Skills
- ✓ *Suggested* Observation of 3-day workshop prior to teaching alone.

Materials Needed:

- ✓ Written Materials & PowerPoint's: participants and facilitators.
- ✓ Bella Acres Video
- ✓ Prop Kit:
  - Balance Sheet Exercises: Wooden Balance Beam; White Boards, tack, cutouts.
  - Farm Analysis: Props for items in Farm Earnings Statement.
  - ROA: dollar in change: 9 dimes, 10 pennies.
- ✓ Equipment for powerpoint presentations or overheads
- ✓ Flip Charts and pens