

# Planning a U-Pick Operation on Your California Farm

**A** U-Pick operation is a direct marketing channel where customers visit the farm to harvest fruits, vegetables, flowers, or trees on their own. Like any marketing channel, a U-Pick has advantages and disadvantages. On one hand, it offers customers fun, memorable experiences that often become seasonal outdoor family traditions. For farmers who spend the majority of their time on their property, bringing in customers can be a nice way to meet neighbors and community and can be an additional sales channel that eases marketing risk. On the other hand, bringing visitors to your fields and orchards opens you up to many risks. This guide examines the U-Pick model, helps you determine whether it's suitable for your farm and gives examples and suggestions for planning and building your U-Pick operation.



*Blueberry pickers at Riverdance Farms, Livingston, CA*

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## Advantages and Disadvantages of a U-Pick Operation

Farmers considering U-Pick enterprises weigh both positive and negative considerations when deciding whether to start inviting farm visitors to pick their own. These are the basic issues:

### Advantages

- Reduced labor needs for harvesting
- Opportunity to meet customers and educate them
- Elimination of some post-harvest handling tasks (sorting, storage, packing, shipping)
- Reduction in packaging costs, particularly when customers bring their own

- No need for distributors
- Diversification of market risk if U-Pick is an additional market channel
- Cash in hand
- Greater market recognition

### Disadvantages

- Risk exposure (food safety and accidents)
- Increased need for customer service labor
- Promotional costs, skills needed and time may be different from other marketing channels
- Unskilled picking leading to loss of some of total yield
- Unpredictable market
- Possibility of challenging customers
- Unpredictable weather – people won't come to the farm in bad weather, so you'll need to have a back-up plan so that you don't lose your crop
- Need for crew for post-U-Pick clean up (to pick up spoiled crop to minimize disease and increase customer happiness)

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## Assessing Yourself as a U-Pick Farmer

**U**-Pick is wonderful if and only if you have the energy to manage it! Many people view running a U-Pick as an easy option, where free laborers harvest and the farmer sits back to relax. In reality, this is far from the truth. In fact, it might be harder to run a U-Pick operation than harvest solely for wholesale or for a farmers' market. The farm is continually exposed; your work-flow is constantly interrupted; you have daily people management; and you need a labor force that can work around U-Pick customers, clean up after the U-Pick customers and harvest ahead of rainy periods or after low-customer-turnout days.

When thinking about your skills and resources, consider your personality first and foremost. Are you a “people-person?” Are you okay with letting go of some of your control? Many operators find that people eat berries when you ask them not to, go exactly where you tell them is off limits, break branches, step on fruit, and ask the same questions over and over. As a U-Pick farmer, you must want people on your farm and truly find joy in their experience with the land and crop. U-Pick operators are more likely to succeed if they are willing and able to:

- Welcome the public on the farm
- Start small and grow with experience and sales
- Produce quality products
- Utilize season-extension techniques to offer products over a longer time period
- Manage costs effectively
- Train and manage employees effectively
- Utilize standard operating procedures to illustrate what you expect from public interaction
- Manage farm safety and liability
- Provide excellent customer service; anticipate and meet customer needs
- Promote the operation effectively
- Communicate effectively with customers and potential customers
- Have employees that can tell the farm story directly to the customer



*Young strawberry picker, Pacific Star Gardens*

- Build relationships and loyalty with customers
- Supervise customers
- Commit to a long-term venture
- Be willing to accept higher levels of crop damage from visitors in your fields and orchards

## Important Elements of Your U-Pick Enterprise

These are essential elements of any U-Pick Enterprise: crop diversity, farm layout, quality and advertising and promotion.

### Crop Diversity and Packaging

**W**hen choosing what crops to offer, carefully consider what works for you and your farm business. Perhaps only one U-Pick crop fits in with other farm commitments, your workload, accounts, and quality of life. That's okay. Only take on as much responsibility as you can manage while maintaining other aspects of your business. To identify crops, it's a good idea to assess your competition and your customers' preferences. If the farm down the road offers raspberries, can you offer a variety that fruits at a different time of year? Will your customers ask for organic, IPM, or low-spray? What price can they afford?

If you've decided to develop your parking, restrooms, and other infrastructure for visitors, it might make sense to utilize these assets more than just once a year when one crop is in season. Think about offering crops that ripen at different times, so you can offer a variety of U-Pick opportunities during the year. A full-season-long (i.e. May through October) U-Pick is exhausting; be prepared for long hours. Some farmers offer U-Pick only on occasional weekends during peak season to supplement other marketing channels; others are open to visitors more regularly. Take time to think about what works best for you and your farm.

For each crop you harvest, offer appropriate picking equipment and packaging so customers can pick and transport the food they pick. Depending on the farm, a variety of buckets, baskets, wagons and even sleds for Christmas trees can be used. Choose your packaging based on the qualities of your crop: fragile berries should be picked into shallow containers to avoid bruising, whereas pumpkins may need to be transported in a small wagon.

### Farm Location and Layout

**Y**our farm must be inviting and welcoming to all because everyone is your guest at a U-Pick operation. Visitors expect a naturally friendly environment that is safe, has clean bathrooms and hand-washing stations, plenty of shade, seating, and fun.

An effective layout will create a clear, straightforward experience for customers and farmers. Many perennial U-Pick crops take a long time to establish, so carefully plan their placement to avoid having to move them later. Annual crops are more flexible; the spring strawberry patch could be next year's pumpkin patch, for example.



*Fresh-picked peaches, Cloverleaf Farm, Dixon, CA*

**As a U-Pick Farm operator, you set your own schedule. Some farmers open every day for long hours; some prefer to open for U-Pick only on designated days or for special events. Here are schedules for two different U-Pick fruit enterprises:**

<p><b>Riverdance Farms</b> is a 70 acre diversified organic farm in Livingston, California, growing walnuts, cherries, blueberries, apricots, persimmons, pomegranates and strawberries. U-Pick sales are about 20 percent of the farm’s total business. The major U-Pick crops are organic blueberries and cherries, some of which are also sold already picked at festival weekends, to distributors and to other farmers for their CSAs. The Riverdance U-Pick schedule is:</p>		<p><b>Pacific Star Gardens</b>, a small organic farm in Woodland, California, operates a U-Pick season from March/April through July. Additional farm marketing channels include commercial sales of seeds and seedlings, farmers’ market sales and a farm stand. The Pacific Star Gardens U-Pick crop schedule:</p>	
<p><b>May</b></p>	<p>Let a few people in to pick by appointment if first cherries and blueberries are ripe</p>	<p><b>March/April to June/July</b> (10 or 11 weeks – open sun up to sun down 7 days/week)</p>	<p>Strawberries</p>
<p><b>Memorial Weekend</b> (end of May)</p>	<p>A big festival with music and vendors and U-Pick when both blueberries and cherries are ripe. 2/3 of the U-Pick cherries and blueberries happen on Memorial weekend</p>	<p><b>May to July</b> - open sun up to sun down 7 days/week</p>	<p>Blackberries, Ollalaberries, Marionberries</p>
<p><b>3 or 4 weekends in June</b></p>	<p>U-Pick cherries and blueberries, as available, but no festival</p>	<p><b>May/June</b></p>	<p>Apricots</p>
<p><b>Several weekends in October and November</b></p>	<p>Persimmons and Pomegranates</p>		

**A soft opening: Steps for the first ten days of strawberry season:**

*Step 1* – People start phoning in February to inquire. When the berries start to be ready (March or April), tell them yes, they can come on out and pick (signs aren’t up yet).

*Step 2* – Email to list; post Facebook notices with pictures to grab a few new customers

*Step 3* – Put up the signs on the road when needed to draw more random people

- Robert Ramming, Pacific Star Gardens



When planning, remember that you are creating a destination location, and therefore you need to design and create the feel and look of the property to accommodate guests and facilitate your interactions with them. This can be challenging as you also plan for the efficiencies of production and land use for your U-Pick operation and for production for other sales outlets.

When laying out the location and design of the operation, consider:

- The requirements of local zoning ordinances
- Types and number of expected vehicles entering and exiting the property
- Number of customers and any characteristics that may affect operation and facility design (for instance, seniors may need transportation and more seating; children may need more supervision)
- Adequate space and effective flow of vehicle and pedestrian traffic in the parking lot
- Flow of customers between parking lot, check-in, container pick-up, fields, retail sales area, checkout, etc.
- Placement of fields/orchards open for U-Pick in relation to fields regularly sprayed/closed to visitors
- Placement of restroom facilities
- Placement of any farm stand or shop facility
- Farm traffic flow: hayrides, vehicles carrying customers to and from fields or other areas, vehicles transporting product or conducting other farm work
- Plans for future expansion
- Neighbors' sensitivity to noise, traffic, crowds, etc.

*If you haven't planted yet, think about the layout in terms of the people flow and staff being able to watch customer behavior.*

- Cindy Lashbrook, Riverdance Farm

Use signs, ropes, fence, and flags to prevent customers from wandering into an area that has recently been sprayed, contains farm equipment or chemicals, or is otherwise unsuitable for visitors.



Parking Instructions, Cloverleaf Farm, Dixon, CA

## Parking

- Do you have enough parking space available?
- Is it clearly marked with enter and exit signs?
- Are your handicapped spaces indicated appropriately?
- Are there smooth pathways leading from the parking area to the fields or check-in area?
- Is the city or county okay with your parking area?
- If your farm is conserved, does your parking conform to any easement restrictions?

## Quality

Quality pertains to the products being picked and to the overall experience a visitor has at your farm. Quality visitor experiences are safe, fun, and informative. Many California farmers believe in offering authentic, educational experiences

to customers. This might mean sharing information about the history of the farm, providing recipes and cooking tips, or explaining about your growing practices. Transfer your excitement, passion, and philosophy into your interactions with customers. Remember, taking the time for conversation can lead to customer happiness.

Customer service is an essential part of quality experiences. Your farm will be the first farm experience for many visiting children. A good experience can transfer to future eating habits, food ethics and consumer patterns, as well as return business. Happy customers will send their friends and family. Unhappy customers will leave bad reviews that are hard to overcome. If you have hired employees, clearly communicate your expectations to them so they can provide appropriate customer service through verbal communication and descriptive signage. An employee manual can be a helpful tool.

## Communications, Advertising and Promotion

**W**hat makes your farm unique and distinguishes you from your competition? Is it your location; diversity of varieties; organic or other production practices; the beauty of your land; ease of access; friendly, knowledgeable staff; produce that no one else grows; value-added products; flowers; educational activities or events? Find your strengths and unique attributes, and develop your promotional efforts around them.

Advertising through roadside signs, Facebook, Twitter, Instagram, TripAdvisor, direct email and newsletters may all be helpful, as will listings in local food and tourism guides. All advertisements and listings should include your farm's location, business hours, working days, types of produce, and any unique services or amenities. Your county or city or CalTrans may have rules about the size of roadside signs allowed on different roads nearby.

Connect with like-minded businesses nearby and develop a referral network. Drop your materials in

### Consistent hours will help establish your business

- Communicate your seasons and hours of operation through multiple channels
- Be open at regular times (especially weekends!)
- Communicate weather or condition-related closings and product availability promptly through multiple channels, especially social media. You can also post information on [localharvest.org](http://localharvest.org), [pickyourown.org](http://pickyourown.org), and [www.calagtour.org](http://www.calagtour.org), which often capture consumers who are looking for U-Pick farms online.
- Know what days and times are slowest, and determine whether your time is best spent on farm projects or operating the U-Pick.



*Weighing station, Cloverleaf Farm, Dixon, CA*



*Weighing station, Riverdance Farm, Livingston, CA*

hotels and travel hubs. Tell employees at your local café when your strawberries are peaking, so they can send customers your way, for example. With your neighbor farmers, create a neighborhood farm trail for car tours or bikers!

Consider pitching a human-interest story to a reporter you know at the local paper, or a blogger with a good following. Announce a new element of your business, hold an event, or report on a field trip you recently hosted. Stay in touch with your customers through newsletters (use a service like Constant Contact or MailChimp), and keep your social media accounts alive and active. Only open as many accounts as you know you can stay on top of. Keep a contact list of farm visitors, and share recipes and farm news with your fans through social media posts and newsletters.

Ultimately, word of mouth and referrals will most likely be your best form of advertising. By bringing customers to the farm, you can share your farm's story directly, give them a great farm experience, and create inspiring educational moments for all of you. Encourage your customers to share their positive experiences on social media or TripAdvisor.



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## Planning and Building Your U-Pick Operation

If you have decided that you might make a good U-Pick operator, and if you have begun picturing a U-Pick operation on your farm based on what you have read so far, the next step is to begin to plan and build your own enterprise. In this section, we will discuss these aspects of the process:

- Permitting and regulatory compliance
- Financial planning and budgeting
- Labor planning
- Food safety & Risk management
- Pricing
- Complementary products, attractions or market channels
- Other considerations

### Permitting and regulatory compliance

**U**-Pick farming is generally allowed “by right” or with a relatively low-fee “site-review” or “administrative” permit on land zoned agricultural in most California counties. However, other county regulations may apply to your U-Pick operation. You will generally be expected to provide parking on-site for your customers (not on county roads), and to provide adequate accommodations for people with disabilities, as determined by your county’s interpretation of Americans with Disabilities Act requirements. There may also be regulations that limit events, limit



*Harvesting Garlic, Eatwell Farm, Dixon, CA*

the size and location of signs, and that define hours of operation, noise and entrance and exit roads and driveways. To learn more, contact your county (or city, if you are within city limits) planning department or county agricultural ombudsman (only available in several counties).

## Financial Planning & Budgeting

**M**aking sound financial choices starts with a market analysis, which will indicate if a profitable market exists for your desired enterprise. Many U-Pick farmers who are just starting out or running U-Pick as a side operation make the mistake of underselling their products. You won't make it if you price your products too low, and you won't help the farming community either. Value yourself and your labor with U-Pick prices that reflect your true costs of goods, production, fair labor, advertising, distribution, energy, materials, and environmental stewardship. Remember, you cannot count on U-Pick at first financially. You will need other outlets until the enterprise becomes established and grows.

When you are doing market research, talk to other farmers, potential customers, UC Cooperative Extension Advisors, your Small Business Development Center, or your local tourism bureau.

*Find answers to the following questions:*

- Is there a need in your location for a (or another) U-Pick? Are there customers interested in picking their own product?
- How much product is a typical U-Pick customer likely to purchase each year?
- How much are customers willing to pay for a U-Pick product?
- What other sources of local products currently exist?
- What are the characteristics, strengths, and weaknesses of competition (other U-Picks and sources of similar products)?
- Is your product unique enough to survive in a competitive marketplace?
- Which types of promotional efforts are likely to be needed, how much time will they take, what skills do they need, and how much will they cost?
- What other opportunities or challenges, such as regulations, exist in the marketplace that may affect U-Pick sales?
- Can the farm produce at a cost low enough and sell enough product at a price high enough to generate a profit?

It is essential that you evaluate the potential profitability of your venture. This includes estimating potential revenues and subtracting estimated costs. When estimating revenues from U-Pick products, consider how much product you're likely to produce, the number of customers you expect to visit, the typical amount of product customers will likely purchase, the estimated price of the products, and the potential income from the sale of non-U-Pick products. When estimating costs,





producers often focus most on the production expenses, but you should include all other costs likely to be incurred by the enterprise. *Although not intended as a complete list of all possible expenses, the following items are some possible expenses a U-Pick operation may incur:*

- Check-in area: tent, pavilion, shed or building
- Cash registers, calculators, and other office supplies
- Credit card transaction fees
- Tables or shelves for product display or storage
- Coolers/freezers for product storage
- Specialty equipment for U-Pick customer transport
- Grounds maintenance equipment
- Gravel for driveway or parking lot
- Fencing materials
- Legal-for-trade (sealed by County Dept of Weights & Measures) scale for weighing items sold by the pound
- Trash cans, bags, trash and recycling pick-up services
- Toilet paper, paper towels, hand soap, etc.
- Port-O-Let rental and maintenance fees
- Picking containers and product packaging materials
- Wagons or sleds to transport product
- Vehicle repair, maintenance, and fuel
- Soap, sanitizer and clean storage area for picking containers
- Benches and/or picnic tables
- Liability insurance
- Property or vehicle insurance not covered under a farm policy
- Professional services of attorney and/or accountant
- Matching clothing for staff
- Utilities such as water, sewer, electrical and gas service
- Phone and phone service
- Computer and internet service
- Wages for U-Pick employees, including Worker's compensation insurance and Payroll taxes
- Self-employment taxes
- Marketing, including signage on and off the farm, logo development, website development, social media marketing, design and printing of brochures or other food materials, business cards, email marketing service fees, and any paid advertising.

*Picking is not done in separate blocks for hired pickers and U-Pick. Instead, the U-Pick customers are allowed in first for a few days, then the hired pickers go through the block.*

- Cindy Lashbrook, Riverdance Farms



Hand Washing Station, California State Fair



Hand Washing Station, Riverdance Farms

## Budgeting

When you are considering shifting part of your current production operation to a U-Pick enterprise, you will be making changes to the farm business that will have one or more of the following effects:

- cause additional income to be received
- eliminate or reduce some costs
- cause additional costs to be incurred
- eliminate or reduce some income

A “partial budget” will allow you to compare a farm business that includes the proposed U-Pick operation to your current farm business operation by evaluating the combined effect of all these changes on your bottom line. For your planning purposes, a sample partial budget template is included as Appendix A, at the end of this guide. An excel version of this budget template, with formulas already entered, is available for [download here](#). To use this budget form, adjust the line items to fit your needs and enter numbers that fit your operation into all the yellow-colored squares. As you adjust the numbers in the yellow squares, you will see the bottom line shift.

## Pricing

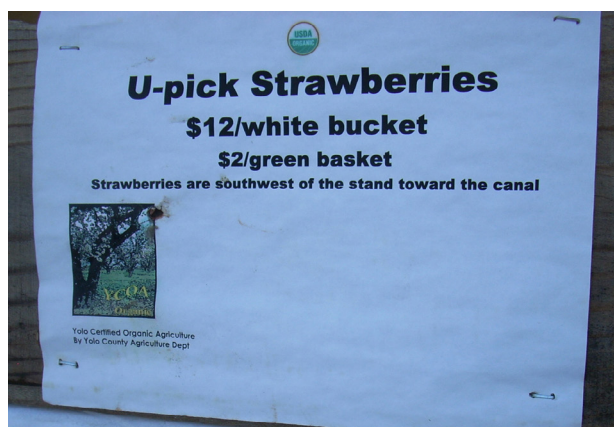
Setting prices for U-Pick crops can be challenging. Start by looking at your cost of production, including inputs, production, fair labor, advertising, energy, land rent, equipment and supplies, and environmental stewardship. Do your best to set pricing that honors your efforts. Factor in customer demographics, values and preferences; characteristics of your competition; market trends; and your business goals.

Some farms charge less for U-Pick products than pre-picked, but others charge the same, since they know visitors appreciate the experience of picking themselves. Consumers place tremendous value on having freshly harvested products, so don't be afraid to charge for this freshness and quality. Customers can also decrease your yield by leaving product in the field, damaging plants, and sampling. Though some level of in-field sampling is generally unavoidable, and often accepted, it is important to convey to customers – through signs and verbal reminders – that U-Pick farming is your livelihood and that they should pay for what they pick! Even so, you may want to add a buffer to your prices to account for product that's eaten in the field.

As you choose your starting prices, try to anticipate how you may need to increase them in the future. For example, there is less of a psychological barrier in moving a price of \$3.00 to \$3.15 than in moving from \$2.90 to \$3.05.

Many U-Pick farmers find pricing by volume may be the simplest option; others decide that pricing by the pound is more reliable. Your decision may depend on the size and variety of the product and the picking container.

Another key part of your farm financial picture is determining how you will accept payment. You can take cash and checks, and use your smartphone or tablet with a mobile credit card processor to swipe credit and debit cards, if you have a good internet connection. Customers will often expect to be able to pay with a credit or debit card, but remember to factor the service charges into your price.



## Labor Planning

When planning for labor, factor in the many roles needed in a U-Pick operation, including people to:

- Greet customers
- Provide information and direction
- Transport customers and products to and from the fields and/or parking lot
- Give directions once customers are in the field
- Demonstrate picking techniques and supervise customers (including reminders of rules)
- Be cashiers
- Harvest overlooked or unreachable produce

# A vegetable U-Pick Farm on the Sacramento River Delta juggles U-Pick prices and labor shortage

R. Kelley Farms is 60 acres in the Sacramento River Delta region. Ron Kelley, owner of R. Kelley Farms, specializes in growing Southern-style specialty beans for picking fresh. He operates a farm stand and U-Pick operation open from July through October. He has created a business model to attract a specific type of U-Pick customers - those who pick in quantity, often preserving their harvest to use over a period of time. One half of the acreage is planted each year in a mix of specialty beans, vegetables and melons. This thirty acres is rotated annually with the other half of the farm, planted in grain or forage or seed crops.

*“I can have a crew of 40 people here on a Saturday morning. Do you know what a crew of 40 would cost on a Saturday morning? Instead I can have two trailer loads of people waiting to go out in the field to pick their own.”*

In addition to the U-Pick option, Kelley hires workers to pick crops for sale at the farm stand, at farmers’ markets and through other channels. He could have used 2 or 3 more hired pickers last year to supply potential farmers’ markets and resellers. He had to turn these potential sales channels away due to not enough pickers. This year, due to the labor shortage, Kelley priced the U-Pick so that more people are attracted to pick their own.

The sales mix used to be 50/50 U-Pick and ready-picked. Now it is 60/40 due to the lack of hired pickers and the resulting change in U-Pick prices. If he needed to go all the way to U-Pick, Kelley says he would close the farm stand, cut down on overhead and operate with only two employees in the field.

A good picker can pick a full bag (25 pounds) of beans in an hour. The average customer at R. Kelley Farm spends 45 minutes to an hour picking in the field. Real serious pickers spend about 2 hours and pick about 50 to 100 pounds. A family can pick 4 to 5 bags. Revenue goes up when the beans are in.

The number of days a block of beans can last is shorter for U-Pick than hired pickers. A regular picking crew will be able to harvest more beans per block than U-Pickers. Therefore, Kelley keeps separate blocks for the hired picking crew than the U-Pick customers.

## **Pricing**

Farm stand prices are based on farmers’ market prices.

U-Pick vegetables are discounted from farm stand prices by about 15 percent.

Beans are sold to U-Pick customers at a price between wholesale and retail.

## **Marketing**

Communications with customers include a Facebook page, a recording on the phone listing what is available this week, and a website with general information.

All communications suggest that customers phone before they come to make sure what crops are available.



*Pickers returning from fields, R. Kelley Farm, Sacramento, CA*



## Complementary Products, Attractions, or Market Channels

**U**-Pick marketing may be a foundation for business growth and expansion. Producers may consider adding new crops to extend the time of year when the operation is open or offer pre-picked or complementary products or services in an on-farm retail market. Listen to customers and staff recommendations for ideas on what to consider adding to the farm.

Value-added products, such as jams and other preserves, can utilize surplus or lower-quality fruit and add to the retail product mix. Complementary products such as pumpkin-carving kits, Christmas tree stands, or decorations such as straw bales or tree ornaments may also increase sales. A U-Pick fruit orchard may consider adding strawberries to start the season earlier or pumpkins to extend the season.

Many U-Pick farms also conduct school tours. Pumpkin, fruit and Christmas tree farms are all popular destinations for schools. You'll need to consider your availability during the school day, how to address potential liability concerns, and how tours might affect your existing business both positively and negatively. School tours may help promote the U-Pick operation as well. Producers may be able to send information with teachers to give students to take home.

Adding complementary products and services may involve additional regulations. For example, producers with concession stands selling products besides fresh raw produce grown on site will need to contact their county Environmental Health Department to learn and comply with food handling regulations and to obtain any needed permits or licenses. Farmers making value-added food products such as jams and jellies or baked goods will need to produce these items in kitchens registered and permitted by their county Environmental Health Department.



*General store, Riverdance Farms, Livingston, CA*

## Food Safety

Bringing guests to the farm can expose both your visitors and farm to hazards and risk. Aside from trampling plants, visitors can introduce a suite of food safety risks.

Visitors must have access to toilet and hand-washing facilities.

Visitors to the farm must be made aware of food safety policies set by the farm. These policies can be reviewed by visitors

through the use of posters, handouts, short policy summaries, or verbally when they enter the farm. You may want to ask visitors to sign in, confirming that they understand your food safety policies.

Key information for visitors should include:

- Areas of the farm they are not allowed to visit
- The importance of not visiting the farm when ill
- Why, when, where, and how to wash their hands
- Instructions to keep pets at home

Wash and sanitize all picking buckets and bins between each use, and store these items off the ground, and covered.

If selling wholesale, some buyers require that wholesale products be segregated from U-Pick products either in time or space.

## Example of communicating with customers about safety

*Things to know about picking your own fruit:*

- Come early in the day to beat the heat
- Wear sunscreen and a hat for protection
- Wear long pants and sturdy shoes (not flip-flops or open-toed sandals). The fields can be weedy and muddy.
- Bring a personal water bottle (drinking water is available)
- Wash your hands before picking fruit (there is a sink and restrooms on site)
- Wash the fruit before eating it
- Do not pick fruit up off the ground

*- From Naylor Organics U-Pick, Dinuba, CA*

## Other Considerations

As you continue planning and building your U-Pick operation, additional elements to be planned include:

- Production planning
- Additional customer comfort considerations
- Employee hiring and training plan
- Risk management plan
- Food safety plan
- Plan for addressing theft

## Evaluating and Adapting

How will you know if you're successful? Develop some indicators of success that will help you evaluate each season. Ask customers for input throughout the season via an idea board or suggestion box. If you have staff members, ask them for feedback as well. Everyone involved will have valuable perspectives

## Risk Management

To help protect your business, post signs indicating where guests are and are not welcome, and purchase adequate liability insurance. Remember to fence any ponds and large equipment areas. For more information on risk management, see the University of California Cooperative Extension's [Foothill Farming Risk Management Guide](#)



and opinions! Also, be sure to track:

- Number of customers
- Total sales
- Average sale per customer
- Sales by product or product category
- Expenses by category
- Weather conditions
- Timing and methods of promotions
- How customers are learning about the operation
- Where customers are coming from
- Injuries or accidents
- Customer complaints or suggestions

All of this information will inform your choices about how you adapt your operation to meet your goals.

## A U-Pick Membership Program - Adapting to over-popularity



**T**orrey Marius Olson and Lucy McBride Olson ran an apple U-Pick operation for about six years on Gabriel Farm, their 14 acre organic farm near Sebastopol in Sonoma County. Over the years, popularity of U-Pick grew to the point where Torrey and Lucy couldn't handle the numbers of San Francisco Bay Area people who would arrive at the farm every weekend.

Several years ago, the Olsons set up a "U-pick/CSA Member Program," and now reserve the u-pick experience for farm CSA members. The price of membership is a case of Gabriel Farm's organic juice. For \$36, customers get three gallons of juice and the ability to pick and purchase whatever is in season. Once they had the membership program established, Lucy and Torrey felt comfortable in opening up the U-Pick options to their full range of crops - from apples, pluots, berries, Asian Pears, tomatoes and flowers in August through persimmons and pineapple guavas in November.

*U-Pick is a wonderful way to connect people to their food and the natural environment. As with any part of your enterprise, it's okay to start small, assess, and grow over time.*

## Appendix A: Partial Budget for Switching a section of a fruit or vegetable farm to U-Pick

A “partial budget” allows you to compare a farm business that includes the proposed U-Pick operation to your current farm business operation by evaluating the effect of changes on your bottom line. An excel version of this budget template, with formulas entered, is available for download here: <https://bit.ly/2tmnIvR>. To use this budget form, adjust the line items to fit your needs and enter numbers that fit your operation into the yellow squares. Watch the bottom line shift.

Positive Effects				Value	Negative Effects		Value
<b>A. Additional Income</b>					<b>C. Reduced Income</b>		
	Expected # of customers per week	Expected average income per customer	Number of weeks in U-Pick season				
1. U-Pick fruit				0	Reduction in wholesale revenue		
2. Sales of additional products				0	other?		
			<b>Total Additional Income</b>	<b>0</b>	<b>Total Reduced Income</b>		<b>0</b>
<b>B. Reduced Costs</b>					<b>D. Additional Costs</b>		
Picking labor					Start-up costs		
Selling labor					grading, paving, gravel, etc		
Packaging cost					permit or license (if needed)		
Shipping/distribution cost					check-in, sales tent or shed		
other?					fencing, gates, etc		
					picnic tables, customer shade		
					hay ride wagon?		
					wagons or sleds for product?		
					signs, scales, shelves		
					other?		
					Total startup costs	Amortized over 10 years	0
					Annual costs		
					U-Pick staff wages		
					U-Pick staff payroll costs		
					additional insurance		
					additional professional fees		
					additional utilities		
					phone service		
					cost of additional products sold	(formula set at 60% of sales income)	0
					soap, sanitizer for picking containers, equipment		
					picking containers, packaging		
					scale licensing & other fees		
					porta-potties & supplies		
					matching tee-shirts for staff		
					marketing costs		
					other?		
					Total annual costs		0
			<b>Total Reduced Costs</b>	<b>0</b>		<b>Total Additional Costs</b>	<b>0</b>
			<b>Total Positive Effects A + B</b>	<b>0</b>		<b>Total Negative Effects C + D</b>	<b>0</b>
<b>Change in Net Income ((A+B) - (C+D))</b>							<b>0</b>

## Resources

Vermont Agritourism Guides - [www.uvm.edu/vtagritourism/?Page=guides.html](http://www.uvm.edu/vtagritourism/?Page=guides.html)

UC SAREP agritourism resources - [asi.ucdavis.edu/programs/sarep/research-initiatives/fs/agritourism-1/agritourism](http://asi.ucdavis.edu/programs/sarep/research-initiatives/fs/agritourism-1/agritourism)

UC Small Farm Program agritourism resources - [sfp.ucdavis.edu/agritourism/](http://sfp.ucdavis.edu/agritourism/)

Agritourism and Nature Tourism in California – Second Edition - [anrcatalog.ucanr.edu/Details.aspx?itemNo=3484](http://anrcatalog.ucanr.edu/Details.aspx?itemNo=3484)

Visitor-Volunteer Food Safety Policy - [ucanr.edu/sites/UrbanAg/files/283578.pdf](http://ucanr.edu/sites/UrbanAg/files/283578.pdf)

California Small Farm Food Safety Guidelines - [ucanr.edu/sites/UrbanAg/files/283565.pdf](http://ucanr.edu/sites/UrbanAg/files/283565.pdf)

University of California Cooperative Extension's Foothill Farming Risk Management Guide: [http://ucanr.edu/sites/placernevadasmallfarms/Farm\\_Business\\_Planning/FBP\\_Risk\\_Management/Risk\\_Management/](http://ucanr.edu/sites/placernevadasmallfarms/Farm_Business_Planning/FBP_Risk_Management/Risk_Management/)

Megan L. Bruch, Matthew D. Ernst, and Center for Profitable Agriculture: A Farmers' Guide to a Pick-Your-Own Operation. University of Tennessee - [extension.tennessee.edu/publications/Documents/PB1802.pdf](http://extension.tennessee.edu/publications/Documents/PB1802.pdf)

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For more Vermont agritourism resources, see [www.uvm.edu/vtagritourism/](http://www.uvm.edu/vtagritourism/)

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