

About the Advanced Business Planning component

The Advanced Business Plan (ABP) component provides funding to help you hire a qualified Consultant/Advisor to:

- conduct an assessment of your business related to a specific issue
- develop recommendations to improve your farm business
- prepare a written report to guide you in making changes to your business.

An established farm business may be eligible for cost-share funding up to 50% of the cost to develop 3 different business plans to a maximum of \$20,000. The maximum cost-share per plan is \$8,000. A new farm business may be eligible for cost-share funding up to 75% of the cost to develop 3 different business plans to a maximum of \$20,000. The maximum cost-share per business plan is \$12,000.

If you want to apply for more than one business plan, you must submit a separate application for each one.

For complete information on the ABP component, see page 11 of the Business Development for Farm Businesses (BDFB) *Program Guide*.

All cost-share funds are available on a first-come, first-served basis, up to the available annual funds for each year of the program.

Your project must be complete and the claim form received by OSCIA Guelph by the claim submission deadline.

How to apply

You can get help to fill in the application from your Advisor, local Ontario Soil and Crop Improvement Association (OSCIA) workshop leader or OSCIA at 1-800-265-9751.

Select an Advisor and type of Advanced Business Plan:

1. Assess the Advisor’s qualifications and experience. Part E of this form provides suggestions on how to do this.
2. Discuss with your Advisor the kind of advanced business planning that will meet your farm business’s need. Remember that your Action Plan must support the business plan you choose.
3. At the end of this application form you will find an appendix for each type of business plan. Review the appropriate appendix for your project with your Advisor to understand the information that must be included in the written report. Decide whether you want any optional reporting sections.
4. Develop cost estimates for all of the work with your Advisor.

Before you send in the application:

1. Select the program year that you are applying for in Part A.
2. Provide all the information required in Parts B, C, D, E and F of this form.
3. Attach all supporting documents to this form.
4. Have the person who is the signing authority for your farm business sign Part G of this form.
5. Have your Advisor sign Parts H and I of this form.
6. Remove the appendices before mailing your application.


OSCIA can only consider complete applications.

Part A What program year are you applying for? Choose one option below.

Option	Claim Submission Deadline	Select Option
2011 program year three	January 15, 2012	<input type="checkbox"/>
2012 program year four	January 15, 2013	<input type="checkbox"/>

If you do not select a program year OSCIA will approve your project under 2012 program year four.

Part B Applicant information

Farm business name	
Farm business registration number (FBRN)	
Contact name	
Contact telephone number	
Workshop leader name	
OSCIA file number (if you know it)	
Is your primary commodity livestock or poultry? If yes: Attach copy of premise identification number (PID) certificate if you have not sent it in before.	<input type="checkbox"/> Yes <input type="checkbox"/> No 

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Project number	BD
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Part C Are you applying for any other funding for this project?

Yes No

If you will receive funding from other government or industry programs for this project, you must fill in the box below.

Other Expected Sources of Funding for this Project	
Name of government or industry funding program	Amount (\$)

Part D What kind of advanced business planning does your farm business need?

Business Plan Type	Reporting Requirements	Select One
General Business Plan (ABP-01)	Appendix 1 – page 11	<input type="checkbox"/>
Succession Plan (ABP-02)	Appendix 2 – page 13	<input type="checkbox"/>
Commodity Marketing Plan (ABP-03)	Appendix 3 – page 15	<input type="checkbox"/>
Direct Marketing Plan (ABP-04)	Appendix 4 – page 17	<input type="checkbox"/>
Human Resource Management Plan (ABP-05)	Appendix 5 – page 19	<input type="checkbox"/>
Risk Management Plan (ABP-06)	Appendix 6 – page 21	<input type="checkbox"/>
Diversification Plan (ABP-07)	Appendix 7 – page 23	<input type="checkbox"/>

At the end of this application form you will find an appendix for each type of business plan. Each appendix shows the minimum reporting requirements for a specific business plan. The reporting requirements include required and optional sections. Your Advisor must follow the reporting requirements when preparing the written business plan.

Part E Choose your Advisor

It is your responsibility to make sure the Advisor you choose is qualified to do the work you want. Some things to consider:

- Does the Advisor have experience in preparing the kind of business plan you want?
 - Can the Advisor provide at least two references from previous clients who can comment on past work that is similar to this project?
 - Does the Advisor have errors and omissions insurance with a minimum coverage level of \$1,000,000?
 - Is the Advisor a member in good standing of a recognized professional organization?
- OR
- Has the Advisor completed a course on professionalism and ethics within the last 5 years?
 - Is there any chance that the Advisor might have a conflict of interest?

A list of consultants with advanced planning experience is available at www.ontariosoilcrop.org/en/bdfbresources

The Advisor I have selected to develop the business plan and complete the written report is:

First name
Last name
Firm name
Address
Telephone number
Fax number
Email

Part F Cost estimate

You must provide a detailed cost estimate for all parts of the project to support your application. Work with your Advisor to develop the cost estimate. Refer to the *Program Guide* for information on activities and expenses that are eligible for cost-sharing.

Itemize the estimated costs using the table below. You may also ask the Advisor to provide detailed estimates on company letterhead.



Remember to attach any additional pages to this application.

1. Advisor fees

Activity	Estimated Time (hours)	Hourly Rate	Cost
Information collection			
Report development: completing minimum requirements (Part a of relevant appendix)			
Report development: completing optional sections (Part b of relevant appendix)			
Review report with farm business			
1. Sub-total			\$

2. Advisor travel expenses

Number of farm visits	
Estimated kilometers for one round trip	
Travel cost (kilometers X number of round trips X \$0.46) =	
2. Sub-total	\$

3. Advisor other expenses

Other costs (for example: car rental, parking)	
Meals	
Other:	
Other:	
3. Sub-total	\$

4. Other Professionals (Lawyer, specialized accountant, insurance advisor, etc)

Professional (name and occupation)	Activity	Estimated Time (hours)	Hourly Rate	Cost
4. Sub-total				\$

Total Project Costs (add up sub-totals 1+2+3+4)	\$
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Part G Farm business declaration and signature

By signing this application form, the authorized signing authority for the farm business, confirms all of the following statements:

1. Pertaining to the Advisor
 - I will work with the Advisor named in the application to carry out the proposed work as outlined in this application.
 - It is my responsibility to make sure the Advisor completes the project in a satisfactory way.
 - The Advisor we have selected has a direct contract with our farm business for satisfactory delivery of the work. The Advisor is not a third party agent of Canada, the Province of Ontario or OSCIA.
 - I have reviewed and discussed the conflict of interest declaration with the Advisor.
 - I authorize our selected Advisor to contact OSCIA and obtain information about the status of this application.
2. Pertaining to finances
 - I have agreed to the cost estimate decided with the Advisor and shown in the application.
 - I understand that we are responsible to pay the Advisor and other professionals for work completed, including all HST.
 - I understand that OSCIA will not issue a cost-share payment until the business plan has met the reporting requirements.
3. True and complete information
 - I certify to Canada, the Province of Ontario and the Ontario Soil and Crop Improvement Association that the information in the application and its supporting documents is true and complete.
4. Program terms and conditions
 - I have read and understand the terms and conditions attached to the application and will follow them completely.

Name of signing authority
(from Part A of the Growing Forward Program enrollment form)

Signature

Date



Part H Advisor declaration and signature

By signing this application form I confirm all of the following statements:

- I have read and understand the reporting requirements for the business plan selected.
- I will complete the business plan as described in this application.
- When the farm business is satisfied that the work is complete, I will submit the report to the farm business.
- I will submit the final report to OSCIA using the Secure Uploading Document System. (Contact OSCIA to obtain your username and password.)
- I understand that information obtained to complete the business plan must not be used or disclosed outside of the BDFB program under any circumstances.
- I agree to follow the federal and provincial privacy and access to information legislation related to collecting, using, disclosing, protecting and retaining the producer's personal information.
- I have reviewed and discussed the conflict of interest declaration (Part I of this form) with the farm business.
- I will disclose any conflict of interest situation to the farm business and to OSCIA Guelph as soon as I become aware of it.

Advisor's name (please print)

Advisor's signature

Date



Part I Conflict of interest declaration

Advisors may be in a conflict of interest situation if their position in a business, or their personal interests, could improperly influence their judgment when carrying out the project. Typical situations where a conflict of interest may arise are those where an Advisor provides consulting services and advice to the producer at the same time as he or she:

1. Works for an organization that may gain financial advantages or benefits from the sale of farm inputs, products, goods or services;
2. Has an existing or potential financial interest in your affairs;
3. Has a family relationship with you (for example: father, daughter, brother or sister-in-law);
4. Is a direct competitor of yours;
5. Has any past, current, or potential interest in how the results of the analysis of your business or intellectual property will be used; or
6. Is currently employed by Agriculture and Agri-food Canada (AAFC) or the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) or Ontario Soil and Crop Improvement Association (OSCIA).

I have read the conflict of interest guidelines above, and have reviewed my own situation in light of these illustrations.
(Select the appropriate box below)

To the best of my knowledge and belief, I am involved in no situation or action that might be regarded as a potential conflict of interest with my duties as an Advisor.

It appears that I am involved in some situations or actions that might be regarded as a potential conflict of interest with my expected duties as an Advisor.

Details of each of these situations and/or actions are as follows:

1.

2.

3.

Advisor's name (please print)

Advisor's signature

Date



Next Steps

1. Double check the application to make sure it is complete. Have you provided all the information needed in Parts A, B, C, D, E and F?
2. Has the signing authority for your farm business signed Part G of the application?
3. Has the Advisor signed Parts H and I of the application?
4. Have you made one copy of the application form and all the supporting documents for your records?
5. Have you removed the appendices from the application?
6. Send the original copy of the application form and all other supporting documents to:

Ontario Soil and Crop Improvement Association
1 Stone Road West, 1st Floor
Guelph, Ontario N1G 4Y2

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OSCIA Provincial Office Approval

Conditional

Date

Full

Date

TERMS AND CONDITIONS

1. I understand that the Project application form(s) and supporting material provided to OMAFRA or OSCIA may be subject to disclosure under the *Freedom of Information and Protection of Privacy Act* (Ontario) or the *Access to Information Act* (Canada) or pursuant to an order of a court or tribunal or pursuant to a legal proceeding.
2. I represent, warrant and covenant that all information provided in support of this request for funds, including information relating to any eligibility requirements, is true and complete.
3. I acknowledge that Canada-Ontario Farm Stewardship Program ("COFSP") / Growing Your Farm Profits: Planning for Business Success (the "Program"), is a voluntary awareness and education program designed to help Ontario farmers prepare confidential and self administered environmental projects and/or business plans for their farm business. While every effort has been made to ensure the accuracy and completeness of the information provided to participant(s) regarding the Program, including any printed or electronic material comments of any employees or agents of OSCIA or OMAFRA presented in association or made in connection therewith should not be considered or relied upon as definitive regarding legislation, techniques, means or methods of growing farm profits for the participant(s). I acknowledge and agree that I have been advised to seek the advice of and rely upon the appropriate technical and professional experts familiar with the applicable legislation, techniques, means and methods as the details of my/our situation may differ from those described in the Program.
4. If the Project is approved under the Program, I understand and accept that in accordance with the *Financial Administration Act* (Ontario), payment is subject to OMAFRA receiving all the necessary appropriation from the Ontario Legislature; OMAFRA receiving all the necessary monies from Canada under the Growing Forward agreements; and my/our compliance with all of the Program's requirements (a copy of which I acknowledge receipt thereof) and these terms and conditions.
5. If the Project is approved under the Program, I agree that I will be solely responsible for ensuring that I meet all technical, structural and legal requirements for this Project, including compliance with all federal and provincial laws or regulations, all municipal by-laws, and any other orders, rules or by-laws related to this Project.
6. If the Project is approved under the Program, I agree that OMAFRA, its authorized representatives or an independent auditor may, upon notice and during normal business hours, enter upon the Project premises for the purposes of inspection and audit. I further agree that these rights shall survive the completion of the Project for a period of seven years.
7. If the Project is approved under the Program, I understand that no member of the House of Commons or of the Senate shall derive any financial advantage or direct benefit from funding provided hereunder, if any, that would not be permitted under the *Parliament of Canada Act*.
8. If the Project is approved under the Program, I represent and warrant that no former federal public office holder or federal public servant who is not in compliance with the Conflict of Interest and Post-employment Code for Public Office Holders or the Conflict of Interest and Post-employment Code for the Public Service shall derive any financial advantage or direct benefit from funding provided hereunder, if any.
9. If the Project is approved under the Program, I represent and warrant that this application for Project funding disclosed all proposed sources of funding, including sources and amounts from federal, provincial or municipal governments, conservation groups, or private persons or other organizations, including in-kind contributions, and that I will continue to do so for the duration of this project. I declare that the total funds from federal, provincial or municipal government sources, conservation groups, or private persons or other organizations, including in-kind contributions, received or receivable, if any, do not or will not exceed 100 per cent of eligible costs as determined by OSCIA, and that no funding assistance will be acquired for the Project from any other Growing Forward initiative.
10. If the Project is approved under the Program, I represent, warrant and covenant that any information provided to OSCIA in support of this request for funds (including information relating to any eligibility requirements) shall continue to be true and complete for the term of the Project in every respect. I shall immediately notify OMAFRA or OSCIA of any changes to this information.
11. If the Project is approved under the Program, I agree that none of Canada, nor the Province of Ontario, nor OSCIA, nor any of their respective directors, officers, agents, employees, members, third party agents or representatives shall be liable to any applicant for any damage or loss whatsoever, or howsoever arising, including but not limited to, damage or loss arising from any advice, opinion, representation, warranty or the provision of information pursuant to this Program or Project, without limitation, whether such acts or omissions be negligent or not.
12. If the Project is approved under the Program, I hereby agree to indemnify and hold harmless Her Majesty the Queen in Right of Ontario and in Right of Canada and Her Ministers, directors, officers, agents, appointees, employees, agents or contractors from and against any and all liability, loss, costs, damages and expenses (including legal, expert and consultant fees), causes of action, actions, claims, demands, lawsuits or other proceedings, by whomever made, sustained, incurred, brought or prosecuted, in any way arising out of or in connection with the Project (cumulatively, "Claims"). I further agree that this indemnity shall survive the completion of the Project for a period of seven years.
13. If the Project is approved under the Program, I understand and accept that the following shall constitute an event of default: (i) failure to carry out the Project; (ii) failure to use the funds provided for the purpose of the Project; (iii) if required, failure to provide reports in accordance with the timelines and content specified by OSCIA; (iv) the nature of my/our operations or legal status changes so that I am no longer eligible for the Program; (v) cessation or suspension of operations; (vi) false, misleading or deceptive statements or representations to OMAFRA or OSCIA; (vii) an assignment, proposal, compromise or arrangement for the benefit of creditors, a petition into bankruptcy or a filing for the appointment of a receiver; (viii) or failure to otherwise comply with all of the Program's requirements or these terms and conditions. I also understand and accept that in the event of a default, OMAFRA or OSCIA has the right to take one or more of the following remedial measures: (i) delay the processing of an application; (ii) deem me/us ineligible for funding under the Program; (iii) suspend, reduce or cancel further funding; (iv) demand the immediate return of an amount equal to any funds provided to me/us under the Program or pursuant to this application; (v) or initiate any lawful remedy deemed appropriate. I agree to immediately comply with any remedial measure, including any demand for the return of funds. I further agree that any amount owing in the event of a default shall be deemed to be a debt to the Crown.
14. If the Project is approved under the Program, I understand and accept that any notice regarding this Cost-Share application shall be sufficiently given by regular mail, postage prepaid and mailed in a Canadian post office addressed to the respective parties at the addresses set out herein or to any other address as may be designated in writing by the parties, and that the date of receipt of any notice by mailing shall be deemed conclusively to be seven (7) days after the mailing.
15. If the Project is approved under the Program, I understand and accept that all amendments to these terms and conditions must be made in writing and executed by both parties.
16. I understand that other information I provide on this form and supporting documentation may be used for the purposes of evaluating, auditing, administering and promoting this Program and Growing Forward. This includes but is not limited to sharing the information with the federal government, OMAFRA and with third parties delivering other Growing Forward programs in order to confirm the information provided, verify eligibility for Program funding, and conduct Program analyses.
17. Notice to Collect Personal Information: Most information collected for this application is related to your business. However, supporting documentation, such as the Premises Identification Number Certificate, or confirmation of a religious exemption for a Farm Business Registration Number may contain personal information about identifiable individuals.
 - i. The collection of any personal information in supporting documents is necessary to administer the Business Development for Farm Businesses Program (BDFBP), which is part of the Growing Forward program. The information will be used to administer, evaluate, audit, verify and enforce BDFBP. It may be shared with other Growing Forward initiatives to verify cross-compliance or for audit purposes.
 - ii. Direct questions about the collection of personal information to: Agricultural Information Contact Centre, OMAFRA, 1 Stone Rd W, Guelph ON N1G 4Y2, phone 1-888-479-3931
 - iii. Indirect Collection of Personal Information: If supporting documents include personal information about an individual other than yourself, you must obtain the individual's consent. Example: If you intend to submit the name of a tenant that is not a business on the Premises Identification Number Certificate, the individual's signed consent is required with the information. A Consent for Indirect Collection of Personal Information form must be included with the personal information submitted. (form available from the Ontario Soil and Crop Improvement website.)