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AGROFORESTRY NOTES

Establishing and Managing an Agroforestry Demonstration Site

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Introduction

Demonstration sites showcase examples of agroforestry in practice. These sites serve as educational resources for many audiences, offering training opportunities for producers, land managers, technical assistance providers, and others. Activities offered by demonstration sites enhance public awareness of agroforestry, as well as foster opportunities for research and promote the adoption of agroforestry practices by conveying the complexity, reality, and feasibility of their implementation. Individuals, nonprofit organizations, academic and research institutions, cooperatives, government agencies, or a collaboration of these groups can manage demonstration sites. They may be open to the public daily, accessible by appointment, and/or accessible through digital media.

This Agroforestry Note provides information relevant to natural resource professionals and technical assistance providers working to establish, manage, or support an agroforestry demonstration site. Additionally, educators, researchers, and producers may find the information useful.

Though establishing and managing demonstration sites share many tasks with establishing and managing any agroforestry system, this publication does not detail agroforestry planning, design, and management in general. For more information on these topics, see the National Agroforestry Center's library of Agroforestry Notes.

Citation

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Banner photo: USDA Forest Service photo by Joe Banegas.

Site Goals and Activities

The design of a demonstration site depends on the goals for the site. Clarifying site goals during the planning phase (fig. 1), sometimes even before a site has been identified, is necessary for successful design and implementation. For example, meeting research goals may require a specific plot design. On the other hand, education and outreach goals may require attending to accessibility considerations that may not be prioritized at a demonstration site where the primary goal is data collection. Other factors, including natural resource characteristics, community context, legal and liability considerations, project timeline, documentation, and succession are also important aspects of the planning process; these are discussed in detail later in this publication. It may be important to evaluate tradeoffs between goals to inform decision making and design.

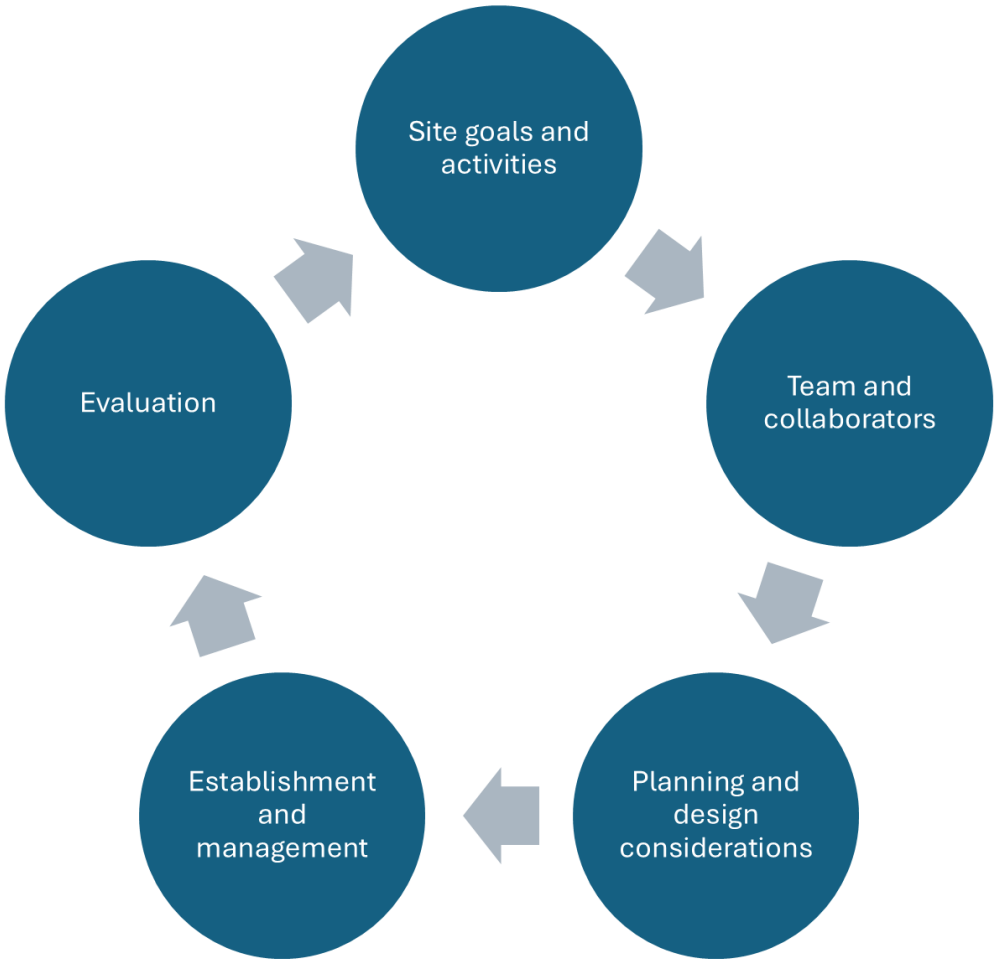

Figure 1—Planning cycle of a demonstration site.

In addition to helping identify the practices and activities to be demonstrated, goals should inform site selection. If a site has not yet been secured for the project, goals related to audience, stakeholders, outcomes, and key activities can provide guidelines for site selection. If a site has already been secured, the goal-setting process can provide information on which parts of the site are best suited for the desired audiences, activities, and outcomes. It is helpful to examine potential site locations in light of their suitability for the desired agroforestry systems and their suitability for demonstration.

KEY QUESTIONS

- **What are the key goals for this demonstration site?**
  Examples: expand public awareness, increase adoption, support conservation education, provide community/event space, serve as a training site, conduct research
- **Who is the main audience for the site? Who will use this site for learning and action?**
  Examples: technical assistance providers, producers, policymakers, general public, educators, Extension professionals, researchers, students
- **What are the key outcomes desired by groups that are contributing to the success of the site?**
  Examples: funders and policymakers interested in impact reporting, researchers interested in collecting data and monitoring
- **How will these goals be revisited and how will the outcomes be evaluated?**
  Examples: annual meetings to evaluate progress towards goals, metrics to evaluate specific outcomes

Demonstration sites can explore a wide range of questions related to agroforestry, including economic viability, establishment methods, plant variety trials, tree and crop interactions, and more (fig. 2). When identifying site goals, consider the potential activities that could occur at a demonstration site (see table 1 for examples). A site may demonstrate multiple activities, but a single site is unlikely to fulfill all of these functions. For example, research can be done at production sites and production case studies can be developed from research sites. However, accommodating multiple goals may come with tradeoffs. The research at the production site may be less efficient than at a research-only site, case studies of research sites may be less useful to producers, or these same sites may be unable to support large events. It can be helpful to discuss which goals take precedent over others and identify primary, secondary, or even tertiary activities. This list of activities at demonstration sites is meant to provide an overview of some common activities that could occur at demonstration sites.

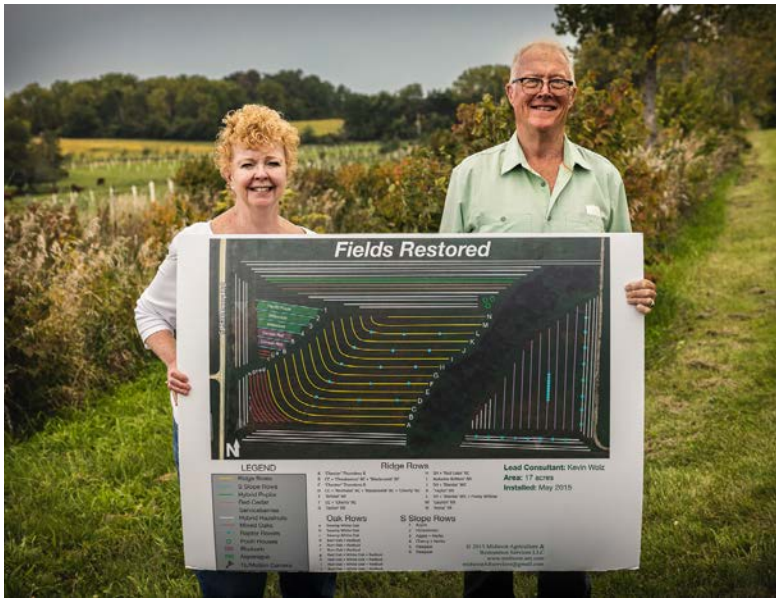

Figure 2—Landholders Scott and Sandy Williams hold a site map for the agroforestry demonstration site on their family's farms. The Williams siblings worked with Savanna Institute to design a planting that would serve multiple goals: produce agroforestry products, host on-farm research, illustrate multiparty management, and showcase multiple agroforestry practices on one site. Courtesy photo by the Savanna Institute.

Table 1—Goals and activities at demonstration sites

Goals	Activities
Education and outreach	Some sites may exist to educate and train natural resource professionals and technical assistance providers, producers, interns, and/or students. Developing agroforestry expertise requires hands-on learning outside of online programs, classrooms, and conferences. Hosting these activities on demonstrations sites can provide valuable place-based learning and continuing education for a variety of agroforestry professionals and practitioners.
Design and field demonstrations	Design and field demonstrations showcase field-based activities and practices in real time. Demonstrations can include one-time activities like planting or ongoing work such as weed management, pruning, etc. Field demonstrations may emphasize the interactions between different components of agroforestry systems, showcase particular practice designs, or exhibit tree, crop, and/or livestock interactions that play out over the life of the agroforestry system.
Events	Some sites may host community or entertainment events, which may not have an agroforestry education or outreach component. These events may require dedicated spaces and infrastructure to accommodate groups. Demonstration sites that host events may prioritize aesthetics and accessibility over other site goals.
Agricultural production	Demonstration sites showcasing agricultural production often prioritize the maximization of yields and emphasize the importance of the economic viability of the agroforestry system. Production-oriented demonstration sites often aim to demonstrate farm activities at a particular scale (backyard, commercial, etc.).
Case studies	Some organizations or individual producers may be interested in sharing information about how they use agroforestry on their farm but may not have the capacity to host in-person visitors. Written, video, or audio case studies can be another approach to sharing information about agroforestry at demonstration sites.
Research	Research activities are designed to answer specific research questions and facilitate data collection about agroforestry. For example, research questions could explore system design, crop suitability, economic viability, ecosystem services, or carbon storage dynamics. Research at demonstration sites may influence site design, for example, to include replicated trials or control for study variables.

KEY QUESTIONS

Below is a list of guiding questions to help anticipate the scope of some activities at a demonstration site and to aid in planning for desired outcomes. While this list is not comprehensive, corresponding questions could be developed for other activities.

Research

- What, if any, organizations will you collaborate with to design and conduct research trials?
- How, if at all, will research plots be accessible to the public? In what ways can you ensure visitors won't impact research outcomes and data collection?
- How will research goals overlap with or be distinct from the other main goals of the site?
- In what ways do you hope to communicate the findings of your research project(s) to producers, the public, partner organizations, and other stakeholders?

Education and Outreach

- What resources (handouts, flyers, signage, videos, maps, lesson plans, etc.) should be developed to best support your education and outreach goals?
- Will you host events onsite? If so, how will you plan for visitor transportation to the site, parking, restrooms, accessibility, inclement weather, shade, water, etc.?
- Will any of your education and outreach materials be available virtually? Where will those resources exist and who will maintain them (e.g., a partner organization's website, public server, social media platform, etc.)?
- What aspects of the demonstration site (plot maps, species or variety selection, photos/videos of site establishment, etc.) should be documented to effectively convey the information you hope to share in education and outreach materials?

Team and Collaborators

Agroforestry systems require intensive, intentional, integrated, and interactive management. At demonstration sites, additional management may be needed for key tasks like volunteer coordination, procurement, educational material development, event coordination, fundraising, and communications. Successful demonstration sites often require full-time work onsite to manage the many components of the system. Some site teams may choose to contract out specialized work like tree planting, monitoring, or media services. Others may choose to rely on trained volunteers for these tasks. It is important to estimate the personnel needs that go along with the site plan, design, and activities over the life of the demonstration. Sometimes these roles and responsibilities are carried out by a single organization or land manager; other times they are carried out by multiple organizations, which may be part of the site planning and management team or external to that team. Because agroforestry systems are inherently long-term efforts, it is important to have a long-term vision for recruiting and retaining the expertise the site requires. See table 2 for an outline of key roles and responsibilities often related to demonstration site management.

Table 2—Key responsibilities and associated tasks

Responsibilities	Associated tasks
Site coordination	Site selection Planning and design Biophysical site assessment and inventory Surveying and mapping Farm compliance with zoning and other regulations
Farm management	Site preparation for plantings Plant material and/or livestock selection and procurement Equipment and infrastructure procurement and maintenance Ongoing field management, maintenance, and recordkeeping Communication and coordination with educational programming about additional field management needs
Volunteer coordination	Volunteer recruitment, training, and scheduling
Educational programming	Development of site-specific curricula Collaboration with partner groups
Development and partnerships coordination	Funding applications and appeals Grant reporting Partnership development
Event coordination	Event logistics and promotion Visitor experience Compliance with event regulations and insurance

A key component of the planning process is understanding who will make different decisions and how they will be made and communicated. This may vary substantially depending on the demonstration site's team members, land tenure, funding, and other factors. Talking in advance about decision making that will take place throughout the planning process can lead to more effective implementation and site longevity.

Well-defined and orchestrated partnerships can help to distribute site costs and magnify the site's impact. Approaching relationships with intention can lead to greater success.

KEY QUESTIONS

When developing a team or group of collaborators, consider the following questions:

- What skills or resources are needed to meet the site's key goals? What can each partner bring to the project?
- What is your preferred geographic scope for project partners? Who are the potential local, State, and national partners (both public and private)?
- Are project partners reflective of the local and/or regional communities the project hopes to serve?
- How can the project better include partners that represent the local community?
- Who is the key contact for each identified partner? Can you keep records of key contacts in a shared digital space so partners are not dependent on one team member's contact list?
- What skills are missing from current collaborations that could be addressed through future partnerships?
- How will the site be financed throughout its lifespan? Which partners will be responsible for securing funding now and into the future?
- What are the expectations related to communication for the partnership? How often (and where) will partners meet to discuss site plans and development?

Planning and Design Considerations

Natural Resources and Landscape

Like all farms, agroforestry demonstration sites are part of a larger landscape. Because of the integrated and interactive nature of agroforestry systems, environmental context is key. Understanding that landscape, including the natural resources, ecological communities, and land uses that are present at the site, can help define design, management, and community goals. Information gathered about the natural resources and landscape will also be key in ensuring the goals of the demonstration site are achieved (fig. 3).

Figure 3—Savanna Institute staff members work to find and map tile drainage at an agroforestry demonstration site in Illinois. Courtesy photo by the Savanna Institute.

KEY CONSIDERATIONS

Within the context of agroforestry, understanding the landscape often includes gathering information about:

- Neighboring land uses
- Topography
- Watershed features and boundaries, location of water table
- Soil types
- Climate and weather patterns, including wind
- Anticipated ecological changes due to climate, pests, disease, or other factors
- Plant and animal communities
- Wildlife corridors
- Social and land use history and context

Questions about these considerations can facilitate conversations about how to incorporate the greater physical landscape, mitigate potential challenges, and open options for research, community support, and funding. In addition, understanding the landscape context helps illustrate how agroforestry can be a tool for applying elements of resource conservation and natural restoration to productive farm landscapes. See the “Additional Information” section at the end of this document for more soil, water, and climate resources. In addition, local experts and neighbors can be excellent sources of guidance.

Community

In addition to landscape considerations, it is important to understand a site's cultural and community context.

KEY QUESTIONS

- Are local producers or others in the community interested in learning more about specific systems, practices, plants, crops, or markets?
- Are there unfamiliar plant species that may grow well in this area but which local producers or others in the community may be overlooking?
- Can the demonstration site help to advance crops, products, or techniques in agroforestry implementation?
- Are there crops or products to avoid planting at the demonstration site so as not to compete with nearby farms or reduce their market access?
- What agroforestry practices address relevant community concerns, such as flooding or wildlife habitat loss?

Agroforestry has rich cultural histories around the world, including in the United States. When gathering information about the site and landscape, demonstration site managers can consider including historical and anthropological research on the historical stewards of the site, including Indigenous communities and Tribes.

KEY QUESTIONS

- Who has stewarded the land over time?
- What practices did people use to tend the land in the past? What practices do those communities use today?
- How did land-related stewardship and the communities engaged in that stewardship change over time?
- Does this land hold significant cultural history for specific communities, near or far?
- As different groups of people have used the land over time, what practices, crops, and stories did they bring with them?

If answers to these questions are difficult to identify for a specific site, the cultural history of the broader landscape may be investigated through county-level or regional records and resources. While these histories, narratives, and information may be hard to find, this information can help those creating the demonstration site build relationships, improve design, and guide maintenance strategies. The information can also strengthen education, research, and outreach work, including cultural activities and community access. Demonstration sites can help properly acknowledge the past, and ensure histories, practices, and stories are not appropriated without consent.

Accessibility

Accessibility considerations may be legally mandated depending on the land's ownership and management. Accessibility is more effectively addressed early in the process of planning, designing, and implementing agroforestry demonstration sites. These considerations include access for people, vehicles, and machines, as well as access to educational, research, and outreach work.

KEY CONSIDERATIONS

Accessibility work may include:

- Providing clear descriptions to visitors about access to areas and paths, including terrain type, evenness of ground, steps, walking length, and how to enter (walking, driving, etc.), view, and exit the demonstration
- Ensuring signs can be read in multiple ways, including text-to-audio transcriptions, translation into multiple languages, and visual diagrams explaining key concepts
- Creating video and audio tours of the site, especially if the site itself is difficult to access and navigate
- Designing education and outreach activities and materials that ensure various audiences can access and understand them (e.g., providing both print and digital materials, creating multiple versions with different languages for different audiences, and developing training materials that describe the site in multiple ways relevant to different audiences)
- Access to protective structures in case of inclement weather
- Access to restrooms, if available

Project Timeline

The process of planning and designing an agroforestry demonstration site can take a significant amount of time and effort, especially when balancing the goals of multiple project partners. The planning and design process is often iterative, possibly overlapping with site preparation and establishment activities. It can take multiple growing seasons to develop strong partner relationships and establish plants, livestock, and infrastructure at the site. Consider which activities will need to occur before others; for example, there will need to be access to a water source at or near the site before bringing in livestock. While it can be exciting to focus on getting the physical site established, having strong partnerships, high-quality plants and planting conditions, and a well-developed plan for future activities will build an enduring foundation for the agroforestry demonstration site.

When building project timelines, consider seasonal climate thresholds that may affect key activities. For example, align project timelines with seasonal planting dates, which can impact plant survival. Seasonal weather conditions can also affect access to the site, especially if heavy equipment will be used for site preparation. When procuring plant material for the demonstration site, communicate with plant nurseries as early as possible to help ensure the desired plant material is available and arrives on schedule, especially for large orders or specialty species. Nurseries may require multiple growing seasons of advance notice to provide specific species in the appropriate quantities necessary for a demonstration site.

KEY QUESTIONS

Some questions to consider about project timelines include:

- What is the general timeline of the project? Are there any deadlines (grant reporting, funding availability, seasonal planting dates) that will influence the planning process?
- What plants will be needed for the project, who will be supplying them, and how much advance notice do nursery growers need to deliver plant materials on time?
- What needs to be done at the site to prepare the soil for planting?
- How does data collection or potential research influence site design and preparation?
- When will labor, equipment, or other materials be available?
- What seasonal and climatic patterns need to be factored into your project timeline?

Project Documentation, Monitoring, and Data Collection

Documentation of the planning process can be a valuable future resource. Agroforestry demonstration sites can be important testing grounds for novel system design, crop suitability, economic modeling, and more. A successful demonstration site project not only presents a healthy, well-managed agroforestry system but also documents the planning, design, establishment, and maintenance of that system (fig. 4).

Figure 4—Signage at an agroforestry demonstration site in Illinois provides information on the species, spacing, and practice goals utilized in a windbreak adjacent to row crop production. Courtesy photo by the Savanna Institute.

KEY QUESTIONS

- What important information about budgets, timelines, and lessons learned throughout the planning and design process can be integrated into future education, outreach, or project replication or expansion?
- What digital, technological, or informational resources were utilized during the design and planning process?
- How can maps and other geospatial tools be used for planning, design, and documentation (fig. 5)? Can they be accessed and utilized by all collaborators?

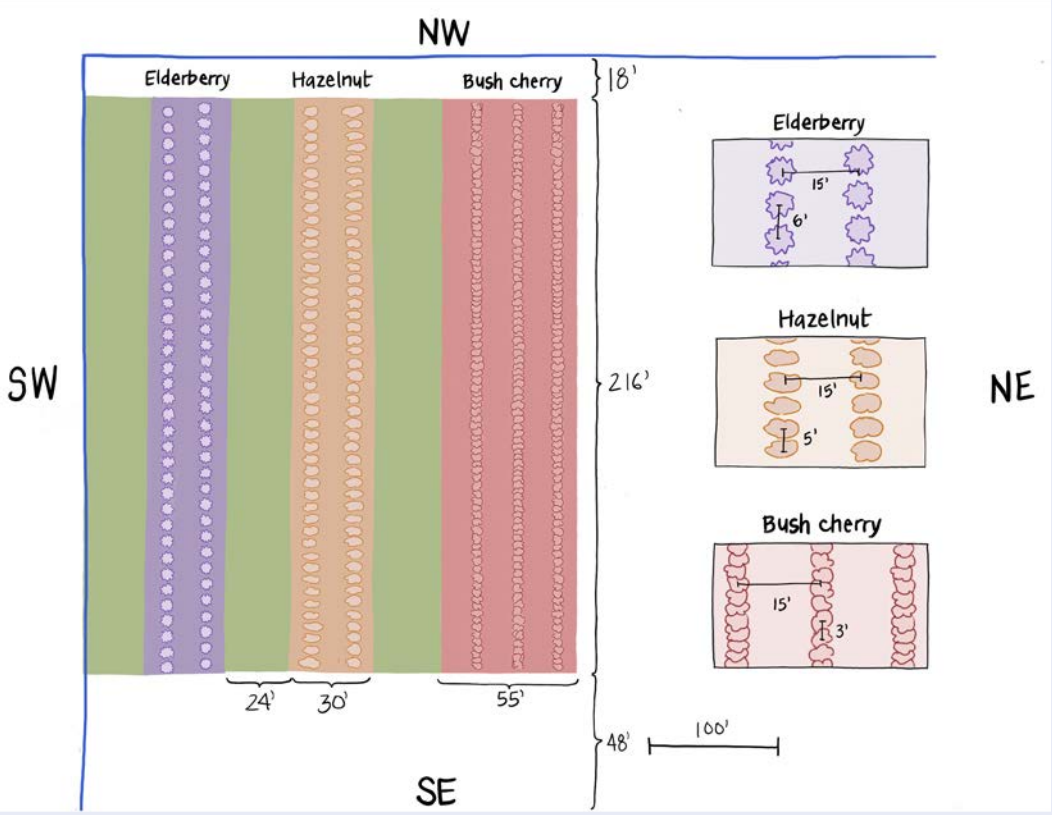

Figure 5—This example of a demonstration site map provides key information about the site. Site maps can be important tools for planning, recordkeeping, and outreach. This site map shows key elements of the Agroforestry Research and Demonstration Site at the Wyman's Blueberry Research Center at the University of Maine, including species, spacing, and orientation. Courtesy map by Alaina Ring, University of Maine Agroecology Lab.

The goals of the agroforestry demonstration will dictate the types of monitoring, assessment, and data collection that are needed. However, there are some basic agricultural recordkeeping practices that will help agroforestry demonstrations succeed and keep legal liability low.

KEY CONSIDERATIONS

Documentation, monitoring, and data collection tools include:

- Crop/planting plans
- Maintenance plans
- Annual inputs tracking
- Integrated Pest Management plans
- Scouting reports
- Fieldwork logs
- Spray and application logs
- Standard operating procedures (SOPs)
- Harvest tracking
- Financial recordkeeping
- Labor tracking (employees and volunteers)
- Updated and accurate site maps

There are programs and applications available that can streamline these processes, but paper recordkeeping, photos taken with a cell phone, and basic spreadsheets can be just as effective. It is vital to have a long-term plan for data storage, including comprehensive metadata (i.e., data about the data) to accompany any information collected about the site. Developing a plan for how these data may need to be presented to the public through educational signage, tours, written resources, academic publications, or digital platforms will help strengthen the delivery of essential site information to target audiences. Having an idea of what the final deliverable(s) may look like can help ensure that the correct data are being collected in the correct form at the correct time.

For demonstration sites where active research is happening, it is important that communication lines are clear and open between staff and volunteers, especially around fieldwork and the timing of activities. If multiple parties are working on one site, good communication is vital to ensure that no goals are compromised due to negligence or lack of awareness. Signage, for example, can be one tool that ensures that sensitive data collection areas are not disturbed.

Financial Planning

Recordkeeping, especially financial recordkeeping, is a key consideration for demonstration sites. While agroforestry demonstration sites are generally not solely focused on maximizing production for economic yields, it is nonetheless important to balance expenses and incoming funds and mitigate financial risks during the planning, design, and long-term management phases. Goal setting and accurate budgeting can help stakeholders understand and anticipate economic needs, opportunities, and constraints. Unlike some businesses or organizations, expenses for demonstration sites may be paid for in nontraditional ways such as through volunteer hours or donated equipment or seed. While this can be more challenging to keep track of, doing so benefits the demonstration site for future planning, tax purposes, and calculating match or cost sharing.

KEY QUESTIONS

Some economic questions that help with goal setting include:

- Will agroforestry products be sold from the site for profit?
- How much profit, if any, will be needed to sustain the operation?
- What is the ideal time horizon for generating income from the site?
- Does the organization need steady cash flow from the operation, or can that be delayed? For how long?

KEY CONSIDERATIONS

It is critical to understand anticipated expenses and income. For expenses, it is useful to estimate and track the timing and amount of the following costs:

- Establishment
- Ongoing maintenance (labor and materials)
- Succession and/or thinning
- Equipment purchases and/or rental and maintenance
- Labor (on-farm, planning, design, education, outreach, research)
- Data monitoring, collection, evaluation, and costs
- Rent, mortgage, taxes
- Signage and educational materials

Potential income streams include:

- Local, State, and Federal grant funding
- U.S. Department of Agriculture payments (such as Farm Service Agency or Natural Resources Conservation Service contracts)
- Charity and foundation support
- Individual donations
- Land lease or sublease payments
- Crop sales
- Event ticket sales
- Agritourism
- Volunteer labor

Following financial best practices for a farm enterprise can ensure positive cash flow and the ability to maintain the agroforestry demonstration over the long term. When planning for the financial viability of the site, consider how other operations in the area will benefit from the demonstration and think about whether the site will compete with area farms, especially when selling goods for profit to support the demonstration site. Economic tools that can provide information on financing and sustaining demonstration sites are listed in the “Additional Information” section of this document.

Legal and Liability Compliance

Navigating the insurance landscape for appropriate coverage of farming activities and on-farm visitors can be complex. It is essential to pursue the coverage that best fits the site's needs. General liability insurance coverage often excludes agritourism activities (farm visitors, events, etc.), so it may be necessary to purchase an "endorsement" or a specialized rider to a policy that covers the specific activities that take place at the site. Agricultural sites that host visitors commonly use umbrella liability policies, and special event liability may be appropriate for one-time events. If outside organizations host events at the site, it is typically best practice to ask them to provide a certificate of insurance for documentation of their policy and an extension of coverage to the site for the duration of their event. If the site has livestock, coverage for accidents caused by animals may be needed.

It is important to understand State and local regulations around farm business coverage and liability. Some States have "immunity laws" around certain agricultural activities, like agritourism, that may provide exemption from liability in certain situations (Hall and Batchelor 2019). However, restrictions often apply, and eligibility requirements may not match the specific site.

In the event of an emergency, it is important to have protocols in place so that employees can respond swiftly. Regular recordkeeping, proper signage, and routine property and equipment inspections can also help to prevent accidents from happening and avoid negligence charges in the event a visitor files a claim against the site owner.

Because insurance policies change from company to company and from region to region, it may be helpful to shop around for the best fit. Candidly conveying the scope of activities that occur at the site to the insurance representative is the best way to gauge whether a company's plan can meet the needs for the site. Take care to ensure all activities are written into the site's policy and revise the policy when a new activity is added.

If the manager of the agroforestry demonstration site does not own the property, there are additional legal considerations. In this situation, a lease and/or memorandum of understanding (MOU) will ensure all parties have clear roles, responsibilities, and legal protections. Long-term leases are preferable for agroforestry plantings, due to the time it takes for an agroforestry system to mature. Rights-of-way, easements, and access areas may also need to be negotiated and documented with the site landowners and neighbors.

All managers, employees, contractors, partners, volunteers, and visitors will also need to ensure they have received the proper safety briefing, training, or licensure. For example, using pesticides onsite will require appropriate licensing with the State to ensure safety and legal protection and access to running water.

Succession Planning

It may take many years for the benefits and drawbacks of an agroforestry system to become apparent. Potential benefits may include wildlife habitat, tree crop production, or enhancing yields of nearby fields by providing wind protection, all of which may substantially improve many years after establishment. Challenges that develop over time include tree and crop competition, pruning needs, or challenges with neighbors. Producers often indicate that they want to see well-established demonstration sites (Jacobsen and Kar 2013, Stutzman et al. 2020, Workman et al. 2003). For these reasons, it is helpful for demonstration site managers to think ahead about who will manage and make decisions about the site over the long term.

Often, succession planning questions are heavily influenced by the ownership of the site and the funding source of the demonstration work. Farms that have been sites for field production may continue to demonstrate these agroforestry systems if the producer continues to be interested in sharing their site. For farms owned by a university, nonprofit, or other entities, succession planning for the site may be more complex. While grants may support agroforestry system establishment, grants that support the long-term management and maintenance of the site are less common. Planning ahead to identify funding and staff capacity to support ongoing demonstration site work will likely benefit the site in the long term. Succession planning for demonstration sites may create opportunities for producers interested in agroforestry to access land, which can provide the long-term land management that demonstration sites require.

Establishment and Management

Establishing a demonstration site may take multiple seasons, and some onsite establishment activities may occur during the planning and design stages. Establishment activities will differ depending on the agroforestry practice. Site preparation, infrastructure development, livestock management, and planting-related activities may take place over several seasons. Often it is helpful to build systems incrementally and spread workload and financial commitments over time.

Careful consideration should be given to which types of tasks are a good fit for volunteers, partners, or those with other roles in the demonstration site. At an agroforestry demonstration site, volunteer days are an excellent opportunity to directly involve partners, media, and community members (fig. 6). This is a great time to generate digital content for future education and outreach materials, so consider inviting photographers, videographers, and press to document different establishment activities. If volunteers assist with establishment, account for time spent teaching proper planting techniques, signing waivers, and describing the site. To make the most of volunteer assistance, allocate plenty of time to stage the site for an efficient workflow.

Figure 6—Many hands make light work at a riparian forest buffer that is part of a The Nature Conservancy's Missouri River Center in Huntsdale, MO. Tree tubes are being used to protect the young seedlings and mulch has been applied to help suppress weeds and retain moisture in the soil around the young plants. Courtesy photo by University of Missouri Center for Agroforestry.

For planting-related activities, set planting dates according to species needs and local climate and seasons, paying special attention to frost dates, the potential need for irrigation, and when the ground will become workable or accessible by equipment. Work closely with nursery growers to coordinate the arrival of plants and consider how they will be cared for between arrival and planting. Follow best practices and always remember the age-old adage—it is better to dig a 5-dollar hole for a 50-cent plant than a 50-cent hole for a 5-dollar plant.

Daily maintenance tasks associated with an agroforestry demonstration site can vary depending on how the agroforestry system is designed. Long-term management and maintenance techniques will also vary based on the agroforestry practices being implemented. Other Agroforestry Notes from the National Agroforestry Center, University of Missouri's Training Manual for Applied Agroforestry Practices, or other practice-specific resources provide more detailed guidance on these topics.

KEY QUESTIONS

A demonstration site may present unique long-term management challenges. When developing a maintenance plan for the site, consider:

- Is there a long-term work plan and timeline for plant management activities, potential future research studies, and community events and engagement?
- What long-term funding and personnel are available for daily and seasonal management tasks such as weeding, mowing, watering, pruning, and harvesting?
- Where will information about the site's maintenance plan and activities be stored, and who will be able to access, update, and share this information? This may include a detailed, multiyear maintenance schedule and important contacts for maintenance, research, and partnerships.
- In the case of a research-oriented site, what metadata about site data will be collected, and how will they be stored and maintained? How will continuity in data collection be ensured in the case of personnel or leadership changes?

Evaluation

Agroforestry demonstration sites provide powerful and unique opportunities for a variety of audiences and stakeholders to experience, learn, and imagine possibilities for how agroforestry can be utilized effectively on landscapes and in communities over time. Successful demonstration sites utilize holistic planning and management that ensure system health for the long haul. This includes regular evaluation of site goals, partnerships, design, management, and demonstration activities, which can be done through surveys, interviews, review and analysis of data, monitoring, and project documentation, as well as other evaluation tools. Revisiting project documentation, data collection, and monitoring protocols can be an important part of this evaluation work.

As demonstration sites grow and change, so may the site's audiences and activities. Agroforestry systems are dynamic, and evaluation ensures that the site can adapt to change over time. Annual reviews can be very useful in evaluating activities that occur on an annual scale. Evaluating the site over a longer time horizon, such as every 5 years, can help identify changes and trends over time. Different sites will require different

evaluation methods and timelines, but evaluation can benefit all sites. Evaluation provides opportunities for site managers and stakeholders to revisit the guidelines outlined above and, potentially, draft new goals, invite new collaborators, and shift activities. Watching agroforestry systems grow and change is one of the great joys of working with these systems.

Additional Information

Demonstration Site Resources

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Economic Resources and Information

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