

Chapter 5: Setting Expectations

You've completed your interviews and have either selected your apprentice or are sending out your offers. Now is the time to clarify details of employment, be sure your apprentice understands and agrees to those details and your ranch or farm policies, and prepare for their arrival. Taking the time to write a strong apprenticeship agreement, create your skills list, and determine how you will orient your apprentice to your operation, yourself, and their new community will get you off to a good start and avoid problems down the road.

Resources:

- [Zoom recording from the winter 2021 call](#)
- [Google slides shown in Zoom call](#)
- [NAP Apprenticeship Employment Agreement Template](#)
- [Sample Apprentice Agreement-diversified farm](#)
- [Housing MOU for mentor/apprentice](#)
- [Items to include in your apprentice employment agreement/contract](#)
- [NAP Apprentice Suggested Gear List](#)
- [2020 NAP Grievance Policy](#)
- [Medical Intake form: San Juan Land & Livestock](#)
- [Orientation schedule: San Juan Land & Livestock Apprentice Orientation](#)
- [Round River Resource Mgmt On-Boarding](#)
- [Sample SJR Skills Checklist](#)
- [Mentoring Partnership Check in Accountability Tool](#)
- [Supporting Mentors to Teach Next Generation Agrarians](#): The Mentor Toolkit from National Ag Apprenticeship Learning Network

Getting off to a good start: What you need to do before apprentice arrive

The last thing you want is for your new hire to show up, having quit their job and relocated, and then one of these kinds of details means they have to leave. This is heartache for all concerned.

When you make your offer:

Be sure you clearly communicate the details of compensation (stipend, room and board), start and end dates for the apprenticeship, your days off policy, and any ranch policies which could be a deal breaker, such as your smoking, visitor, or pet policies. Even if you discussed these during your interview, as well as stated them in

your NAP Mentor Site Description, it's best to review them upon hiring. These details will be written in your employment contract and housing lease with your apprentice, but it's good to be sure the apprentice has truly considered them and agrees to them in advance of arrival.

The policy items most commonly clarified are:

- Cell phone use during work hours: Be very clear on use during work day as this generation is use to unlimited access -- for example, they can listen to podcast while fixing fence but not when handling or herding livestock
- Work Schedule: Be explicit with the length of your work day, and how this changes based on the season/month
- Compensation: Monthly stipend amount, room and board you offer -- is it a shared midday meal and if so how often, a freezer full of meat, a food stipend, etc.
- Smoking/drugs/alcohol use on or off the property: Are you a non-smoking operation? Does this mean no smoking anywhere or is it ok in some places? If you are in a state where marijuana is legal, is this ok during off hours in housing you supply?
- Cleanliness expectation with housing and work areas: Do you want to ask for a cleaning deposit? Apprentice definition of clean may not meet the standard you need
- Live-in partners: While their partnership or family situation can't be a reason you do or don't hire a person, it is vital that you clarify whether the housing you provide is for the apprentice only, or if a live-in partner is ok and if so how you will handle house expenses like utilities, etc
- Visitors: How often and how long are visitors welcome to visit your apprentice and stay? How much notice do you want before they arrive?
- Pet policy and working animals
- Time off in addition to the weekly day off: If you do allow this, clarify how much advance notice you want and that this time is at the convenience of the ranch schedule, etc. Some ranches regularly give additional time as needed for medical appointments, etc.. Other ranches have a set amount of extra time off that the apprentice must track and use sparingly
- If your own home functions as headquarters for the ranch/farm, clarify how the shared space is kept in order.

Before they arrive:

NAP requires that apprentices be hired as employees, with a written contract or work agreement, and that you carry Workers Compensation insurance. You'll want to have those things in place before the apprentice arrives.

Employment documents

- Your written employment agreement or contract needn't be lengthy, but it is good to include the basic elements of the position such as compensation and schedule, a general list of duties, and a reference to the NAP grievance policy. Consider including an addendum that lists your ranch/farm policies.
 - Sample contracts/agreements:
 - [NAP Apprenticeship Employment Agreement Template](#)
 - [Sample Apprentice Agreement-diversified farm](#)
 - [Housing MOU for mentor/apprentice](#)
 - [Items to include in your apprentice employment agreement/contract](#)
 - [2020 NAP Grievance Policy](#)
- Print out a W-4 so your apprentice can indicate their tax withholding preference, social security number and best address for tax purposes.
- If you work with an accounting firm they may be able to set up a payroll system and run payroll for you. Many online payroll systems exist but may not be cost-effective if you only have one or two employees. You can also set this up in-house, but confer with your local Small Business Association office, your accountant or bookkeeper or someone else able to assist you so you accurately determine what you will withhold from the paycheck as well as calculate your payroll tax liability with paying the employer's portion of Social Security and Medicare, and how you will submit your payroll taxes
- Medical Intake Form: While you can't ask health related questions during the interview, you can ask employees, once hired, to let you know of any health issues, allergies, medications, etc., so you can communicate this to health professionals in an emergency. At least get an emergency contact person for your apprentice, if nothing else. Here's a [template for a medical intake form](#) used at San Juan Land & Livestock.

Creating your Skills Sheet:

Your Skills Sheet is the core of the education program you offer as a mentor. It is both useful and required. It serves as a syllabus, outlining all the educational opportunities available to your apprentice. It helps you plan how best to teach the skills you need your apprentice to learn, assess their progress, and strategize ways to

incorporate learning into your work days. It is required, as it is legal proof that NAP apprentices receive focused, intentional training and education as part of their apprenticeship.

In the next chapter, on Balancing Education and Work, we'll discuss how to use the skill sheet during your season. Here, we'll focus on creating that Skill Sheet.

Your NAP Coordinator can help you create your Skill Sheet, but one of the best ways to begin is to make a list of every skill a ranch hand needs to do on your operation. Once you make that list, it will become clear which of these you want to teach an apprentice. For example, while some operations use tractors frequently, you may decide you don't want to teach novices how to run equipment. In that case, you wouldn't include tractor operation and maintenance on your Skill Sheet.

Once you have determined which skills you want to introduce your apprentice to, and help them acquire, you think through the progression of learning steps that skill requires. This is placed in a spreadsheet and becomes your Skills Sheet. Skills Sheet categories mentors often include are Tools and Equipment, Animal Handling and Husbandry, Land Management, Workplace Ethics, Horsemanship, and Business and Administration. Within Land Management, Pasture Planning could be listed, as well as Pre and Post Grazing Assessment, and Monitoring Land Health.

Here is a [Skills Sheet template](#) for a cattle ranch apprenticeship. Use this to determine what skills you want in your Skills Checklist, and how you wish to organize it. More information on using the Skills Checklist throughout the apprenticeship is covered in Chapter 6 of this toolkit.

Topic 2: What does the *apprentice* need to know before they arrive

Your incoming apprentice is excited to arrive, and is often eager to prepare even as they tie up loose ends with their current job and begin packing to move. More than likely, they are moving to an entirely new region and community. There are a few simple things you can do to help them make a smooth transition.

- Gear List: Most mentor sites are a long way from stores where apprentices can buy clothing or tools they'll need upon arrival, so NAP has compiled a [Suggested Gear List](#). Review this and add or edit as you see fit for your operation, then send it out to your apprentice a few weeks before they will arrive, so they have time to purchase any items they need. Some mentors

choose to supply work gloves, pliers, irrigation boots, or other gear they wish apprentices to have. This is not required of you.

- Postal Mail: While apprentices are skilled with email and other virtual communication, they may still need a postal address. Send them the mailing address for either their housing (if it has a separate address) or your ranch so they are able to receive mail.
- Resource List: Compile a list of readings, videos, podcasts, etc that you find interesting or useful in your own operation and send this to them. This helps them become familiar with the lexicon of your type of agriculture, management practices and ideas you find valuable, and will help them better understand you as a mentor and the operation. NAP has a resource list we send to incoming apprentices, but you may have specific sources you want them to look into. For example, some ranches send a few articles on low-stress stockmanship, pasture management for recovery, winter grazing techniques, shepherding, or animal health. They may not read them all (after all, they aren't on payroll yet!), but most people will dig into these due to their excitement and anticipation. Consider a reading or podcast that covers life and death on ranches, as this is harder on apprentices than they imagine it might be.
- Consider giving them some sense of the history and current condition of your area, by sending them the name of your local newspaper, or any recommended reading about your area. Apprentices are often very curious about their soon-to-be home.

Topic 3: Arrival/First week: Orientation or On-Boarding

No matter who they are, your apprentice is bound to be a little overwhelmed in the first week or two of their apprenticeship. Help them understand the flow of your workday, work week, and how you set priorities, as they are ready to work and want to dive in -- but may have no idea how best to do that. A structured orientation week will help them settle in and focus on what you most want them to do and learn first. Here are two different sample orientation schedules for you to alter for your own operation:

- [Orientation schedule: San Juan Land & Livestock Apprentice Orientation](#)
- [Round River Resource Mgmt On-Boarding](#)

You'll see from these samples, there are a number of things NAP asks you to do within the first ten days, as well as things that are specific to your operation. This list includes:

- Sign employment paperwork and housing agreement
- Get her/his emergency contact info → put this somewhere easily accessible get a copy of a medical insurance card if they have it.
- Complete medical intake form and get a copy of their insurance card, in case we have to take them to the ER and they aren't conscious, etc. And give them your emergency info too!
- Give them a set of maps of the ranch/farm and pastures/fields, show them where they all are -- if there is time, we'll take them to all those fields so they get useful and autonomous early. They can take the map with them when they go to a field and they can find fences, gates, water points, etc.
- Discuss day off -- what day they will be taking
- Review ranch/farm safety policies, workers' comp, vehicle policies, etc.
- Do a vehicle assessment with them -- walk around the trucks or equipment you want them to use, get a sense of how adept they really are -- go on a drive with them and see if they are going to burn out your clutch, etc.
- Complete a baseline Skill Sheet assessment and talk over which skills are most present at which time of the season, so they see how the education fits into daily work.
 - Consider having them star the skills they are most interested in learning. While these may not be the most critical skills you need them to learn right away, it demonstrates that you want to support their goals, and you can look for times in the season when you *can* focus on these things.
 - The baseline will help you figure out where you need to focus your mentor energy first, so the apprentice becomes capable with whatever chores are the ones you need them to learn first. It also helps you determine where they can be useful right away
 - Prioritizing this meeting makes clear to them that their education is important to you. This really builds trust.
- Review ranch/farm schedule, work schedule/rhythm, days off...
- Consider having a white board ranch/farm calendar that you use interactively with them during team meetings, etc, as this will help them learn all that you are navigating, what is a priority, and where they can fit in to help (a sample is in the Zoom slides)
- Have a social meal with them, or play cards, watch a movie, have more opportunity to get to know each other right away. This establishes a healthy and fun relationship that helps us get through the hard days

- Have a conversation where they tell you their goals -- practical and personal-- for the apprenticeship, in relation to their job duties and skill sheets. And tell them some of your goals!

A few final organizational supports to consider:

- Anything you can do to help them quickly orient to your work schedule, property and pastures, your area and yourself will be a big support. Here are some ideas that mentors find useful:
 - Consider creating an apprentice or employee handbook -- policies, maps, important phone numbers, where the grocery store and tire store are, etc.
 - Have a ranch/farm calendar - some mentors use Google calendar and include ranch work but also whose day off it is, when the mentor has a meeting or event and won't be available, etc.
 - A white board that is the Task List can be a real asset. It's a place to note smaller projects that your apprentice can do on their own, at least once you have lined them out on that task. For example: oiling tack, inventorying polywire reels and pigtail posts to see if more are needed, repair fence, caulk water tanks, etc. This helps the apprentice grasp all the pieces of the puzzle -- they want to learn how to think about all the things you think about as a manager.
 - Create a simple calendar that notes the Big Events of each season: that calving is March - June, branding is in early May, head to ranch June - Sept. The seasonal shifts can be disorienting for apprentices when they start but giving them a printed 'big strokes' calendar can help them
 - Some ranches use online programs like Asana to organize tasks

Ultimately, the best way to communicate expectations about anything -- policies, schedules, or the right way to set up portable electric fences -- is to explain WHY. If your apprentice understands why early mornings are necessary in August, why their friend can't bring a pet poodle to visit, or why they need to have a safety check prior to driving a tractor, they will realize why it is important to do things the way you have outlined them, at least at the start of their apprenticeship. And they'll know when and how to suggest a new idea, ask for feedback, and become useful and effective members of your team.

Education on a working farm or ranch is co-created by the mentor and apprentice, so a shared understanding and agreement of how work and education occur is the

foundation for shared expectations. Some learning is built in to each day's chores, some learning is season-specific, and some learning will require intentional teaching time scheduled proactively. The sooner you discuss your calendar and work flow, and get a read on your apprentice's incoming skill level and learning aptitude, the sooner you'll be able to co-create a system for learning to happen.

The table below, adapted from *The Mentor's Guide*, by Lois J. Zachery, is a sample of the questions to discuss in order to clarify expectations.

Outcomes	Questions to Ask
Well-defined goals	What are the specific learning outcomes desired by mentee and mentor during this time?
Measuring Success	What criteria will we use and how often will we evaluate progress?
Mutual Responsibility	Who is responsible for which elements of our meetings, accomplishing goals, etc?
Accountability	How do we make sure we follow through with our responsibilities? How will we remind each other when we are not following through with scheduled meetings, trainings, etc?
Stumbling Blocks	What kinds of challenges might we encounter due to time, learning curve, etc? How do we want to address these when they arise?
Mentoring Agreement	What do we want to write down as our agreement on the above points?
Work plan for learning goals	How will we identify the next most relevant learning goal, and what is our plan to make sure we take advantage of it?

Refer to the section on Work and Education Balance for tips on creating S.M.A.R.T.E.R. goals, learning plans, skill sheet use, and other ways to create clear goals, measure success, and determine how and when focused learning can occur.

A few additional tools to help you create sound accountability for yourself and your apprentice are listed here.

Levels of Ongoing Accountability (adapted from *The Mentor's Guide*, by Lois J. Zaczary)

The mentoring relationship	<ul style="list-style-type: none"> ● How are we doing? ● Are we satisfied with how our interactions are going? ● What might we try to strengthen our relationship and communication?
The learning process	<ul style="list-style-type: none"> ● Are the lessons, on-the-spot teaching and other educational processes working for you? ● How are your learning goals moving forward? ● What can we try that could make your learning stronger/better for you? ● What are you learning about yourself as a learner in this environment?
Progress towards learning goals	<ul style="list-style-type: none"> ● Which of your goals are moving ahead well? ● What's been a success for you thus far? ● What's your biggest frustration? ● What's giving you the most satisfaction about what you are learning?

From *Common Sense Mentoring*, by Larry Ambrose

- "If you are not hearing from your mentee, don't wait". Be proactive and set up a time to talk, and talk *only about what is going on in your partnership*, not about the current topic being learned. Your objective is to find out if your mentoring is effective or not, and if not, what you can do to make it better
- Mentees have lots of feedback for you, but they will seldom tell you about it. Mentees will 'assign authority' to you, and have been taught to avoid giving feedback to an authority figure. Solicit feedback from them! Ask:
 - "Tell me one thing I can do more of or begin doing that would help you?"

- “Tell me something that I do that isn’t helpful?”
- “The other day I gave you lots of details when describing how the engine works -- was that useful or was it confusing? What would have been more helpful for you?”

[Mentoring Partner Check in Accountability Tool](#)

Mentoring Agreements

Some programs choose to clarify expectations regarding the educational process and responsibilities in a written mentoring agreement. While it may feel overly formal for a ranch or farm setting, it can be useful to write down your basic agreements regarding how often you will check in with one another regarding the progress of learning goals, whether or not your teaching is clear, and strategize how to keep the learning going during busy times of the season. An example can be found in the [Ag Apprenticeship Toolkit](#), page 57.

Additional Resources:

- US Dept. of Labor ["*Credit towards Wages under Section 3\(m\) Questions and Answers*"](#) (this discusses how room and board can legally be counted towards the minimum wage for ag workers--your state law may not adhere to this)
- US Dept of Labor ["*Fact Sheet #12 "Agricultural Employers Under the Fair Labor Standards Act \(FSLA\)"*"](#)