



DBI PERFORMANCE MEASURES DATA COLLECTION GUIDE



All applicants must identify at least one outcome and indicator from the list below that will be addressed through their grant projects. Applicants will need to establish baseline numbers and/or estimate realistic target numbers for the outcome(s) and indicator(s) they select. Below are outcomes and indicators and some guidelines on how to collect data on the outcomes and indicators.

OUTCOME 1: ENCOURAGE THE USE OF REGIONAL MILK PRODUCTION

Indicator 1.1: TOTAL NUMBER OF PARTNERSHIPS AND/OR COLLABORATIONS ESTABLISHED BETWEEN DAIRY PRODUCERS/PROCESSORS AND LOCAL/REGIONAL SUPPLY NETWORKS ____.

- 1.1a: Of those established, the number formalized with written agreements (i.e. MOU's, signed contracts, etc.) ____.
- 1.1b: Of those established, the number of partnerships with dairy cooperatives ____.



Data on partnerships or collaborations can be collected by establishing counts of partnerships formed, whether informally (noting in-person handshake agreements and partnerships formed via phone, email, etc.) or formally (noting number of MOU's or contracts signed).

Indicator 1.2: OF THE TOTAL NUMBER OF PARTNERSHIPS AND COLLABORATIONS IDENTIFIED IN 1.1, THE NUMBER THAT REPORTED

- 1.2a: Expanded/improved local/regional dairy infrastructure ____.
- 1.2b: Higher profits ____.
- 1.2c: More efficient transportation ____.
- 1.2d: Improved marketing channels ____.
- 1.2e: Increased volume of local/regional milk used ____.
- 1.2f: And/or other mid-tier value chain enhancements ____.



Data on 1.2a-1.2f can be collected from relevant partnerships formed after receiving services supported by the grant. Stakeholders should establish baselines of the required metrics prior to implementing the partnership and/or collaboration and noting whether an increase or decrease of that metric occurred. 1.2b can be reported on a per-constituent level (i.e., if two partners in one partnership both experience higher profits, they can both be counted under this sub-indicator). Reporting on 1.2a and 1.2c-1.2f should be reported on a partnership-level (i.e., the resulting improved metric is reported on a per-partnership basis, rather than each constituent within a partnership reporting separately). Improvement can be measured by increased volume and/or capacity to move volume, increased speed, waste reduction, decreased distance between point of production and point of sale, decreased time spent, higher quality technology/infrastructure, etc. Efficiency can be measured by evaluating the ratio of inputs (labor, time, resources, etc.) to outputs (product).

OUTCOME 2: DIVERSIFY AND EXPAND DAIRY PRODUCT MARKET OPPORTUNITIES

Indicator 2.1: NUMBER OF DAIRY BUSINESSES THAT IMPLEMENTED NEW MARKETING PROCEDURES ____.



Data on number of dairy businesses who implemented new marketing procedures can be collected by establishing counts of businesses that implemented new or innovative marketing strategies after receiving services supported by the grant.

Indicator 2.2: TOTAL NUMBER OF EXISTING MARKET ACCESS POINTS THAT ESTABLISHED AND/OR EXPANDED DAIRY PRODUCT OFFERINGS ____.

Of those, the number that were

- 2.2a: Farmers markets ____.
- 2.2b: Roadside stands ____.
- 2.2c: Agritourism ____.
- 2.2d: Grocery stores ____.
- 2.2e: Wholesale markets/buyers ____.
- 2.2f: Restaurants ____.
- 2.2g: Agricultural cooperatives ____.
- 2.2h: Retailers ____.
- 2.2i: Distributors ____.
- 2.2j: Food hubs ____.
- 2.2k: Shared-use kitchens ____.
- 2.2l: School food programs ____.
- 2.2m: Community-supported agriculture (CSAs) ____.
- 2.2n: Other ____.



Data on expanded dairy product offerings can be collected by establishing baselines of dairy product line offerings at the beginning of the grant period and tracking product line expansion within the organization, in collaboration with other organizations, and/or on behalf of other partner organizations after receiving services supported by the grant.

Indicator 2.3: TOTAL NUMBER OF NEW MARKET ACCESS POINTS THAT ESTABLISHED DAIRY PRODUCT OFFERINGS ____.

Of those, the number that were

- 2.3a: Farmers markets ____.
- 2.3b: Roadside stands ____.
- 2.3c: Agritourism ____.
- 2.3d: Grocery stores ____.
- 2.3e: Wholesale markets/buyers ____.
- 2.3f: Restaurants ____.
- 2.3g: Agricultural cooperatives ____.
- 2.3h: Retailers ____.
- 2.3i: Distributors ____.
- 2.3j: Food hubs ____.
- 2.3k: Shared-use kitchens ____.
- 2.3l: School food programs ____.
- 2.3m: Community-supported agriculture (CSAs) ____.
- 2.3n: Other ____.



Data on new market access points that established dairy product offerings can be collected from relevant market access points that began offering dairy products after receiving services supported by the grant. Recipients should note at the beginning of the grant period which access points did not offer dairy products and were targeted to expand their product offerings to include dairy products.

Indicator 2.4: NUMBER OF DAIRY BUSINESSES THAT INCREASED DAIRY PRODUCT SALES BY SELLING TO NEW/ADDITIONAL MARKET ACCESS POINTS TO MEET INCREASED DEMAND ____.



Data on increased sales can be collected by establishing baselines of sales data at the beginning of the grant period and noting if there was an increase after selling to new/additional market access points. Sales data can be tracked by noting change in dollar amount, percent change, or a combination of volume and average price. Stakeholders are not required to report a numeric value, so reluctance to share financial data should not impact this reporting requirement.

Indicator 2.5: NUMBER OF MARKET ACCESS POINTS REPORTING INCREASED SALES OF DAIRY PRODUCTS ____.



Data on increased sales can be collected by establishing baselines of sales data at the beginning of the grant period and noting if there was an increase after receiving services supported by the grant. Sales data can be tracked by noting change in dollar amount, percent change, or a combination of volume and average price. Stakeholders are not required to report a numeric value, so reluctance to share financial data should not impact this reporting requirement.

OUTCOME 3: PROMOTE BUSINESS DEVELOPMENT THAT DIVERSIFIES FARMER INCOME THROUGH PROCESSING AND PRODUCTION INNOVATIONS

Indicator 3.1: NUMBER OF DAIRY BUSINESSES THAT GAINED KNOWLEDGE ABOUT DAIRY PRODUCT DEVELOPMENT OR DAIRY BUSINESS IMPROVEMENT METHODS ____.



Measuring the number of dairy businesses who gained knowledge about dairy product development or dairy business improvement methods will vary depending on recipient activities and types of stakeholders engaged. The [Data Collection Considerations section](#) outlines methods for measuring knowledge gain through surveys, separate studies, measuring digital traffic, and tracking transactions and/or returning customers. Recipients who are required to collect this data will identify an appropriate method for establishing baseline and updated knowledge-related data to report on this indicator.

Indicator 3.2: NUMBER OF DAIRY BUSINESSES THAT IMPLEMENTED NEW OR MODIFIED DAIRY PROCESSES OR PRODUCTION METHODS ____.



Data on the number of producers or processors that implemented new or modified dairy processes or production methods can be collected by establishing counts within an organization, in collaboration with other organizations, and/or on behalf of other partner organizations after receiving services supported by the grant.

Indicator 3.3: NUMBER OF DAIRY BUSINESSES THAT EXPANDED THEIR EXISTING DAIRY PRODUCT LINE ____.



Data on expanded product lines can be collected by establishing baselines of product offerings at the beginning of the grant period and tracking product line expansion within the organization, in collaboration with other organizations, and/or on behalf of other partner organizations after receiving services supported by the grant.

Indicator 3.4: NUMBER OF DAIRY BUSINESSES THAT BEGAN PRODUCING DAIRY PRODUCTS ____.



Data on number of stakeholders who began producing new dairy products can be collected by establishing counts within an organization, in collaboration with other organizations, and/or on behalf of other partner organizations after receiving services supported by the grant.

Indicator 3.5: NUMBER OF DAIRY PRODUCTS CREATED OR ENHANCED ____.



Data on number of dairy products created or modified can be collected by establishing counts of created/modified dairy products within an organization, in collaboration with other organizations, and/or on behalf of other partner organizations after receiving services supported by the grant.

Indicator 3.6: NUMBER OF DAIRY BUSINESSES THAT INCREASED DAIRY PRODUCT SALES MEASURED IN

- 3.6a: Dollars ____.
- 3.6b: Percentage change, or ____.
- 3.6c: Combination of volume and average price ____.



Data on increased sales can be collected from relevant producers or other stakeholders engaged by the grant recipient as part of the established project. Recipients should compare baseline sales to sales data after their marketing campaign is concluded. Recipients can encourage producers or other stakeholders to share sales data in the following ways:

Education: Educate producers on how their data is being used, the purpose of the data collection, importance of data collection, etc.

Transparency: Increase transparency through the use of clear, easy-to-understand contracts, data-use agreements, etc. Ensure producers/ stakeholders fully understand the contract prior to signing.

Trust: Build trust with producers/stakeholders by highlighting shared core values, interests, commitments to common causes and the mutual benefits of sharing information (show direct, tangible benefits to producers, such as financial sustainability, training, etc.).

Other Best Practices: If possible, recipients can develop privacy policies to keep producer/ stakeholder identities anonymous. AMS should work with recipients to facilitate trust building and educate recipients on how sales data is used by AMS.

Indicator 3.7: NUMBER OF DAIRY-RELATED JOBS

- 3.7a: Created ____.
- 3.7b: Maintained ____.



Data on dairy-related jobs created or maintained can be collected by establishing baselines of the number of dairy-related jobs at the beginning of the grant period. Growth (or maintenance) can be discerned by monitoring dairy-related job numbers after receiving services supported by the grant. Dairy-related jobs should be monitored through the organizations' payroll. Stakeholders should refer to the definition of jobs, which discerns between "created" and "maintained," to accurately report this data. Recipients can determine jobs according to the number of full-time employees (FTEs) within an organization, in collaboration with other organizations, and/or on behalf of other partner organizations. FTEs can be calculated based on the average number of hours worked by an FTE per year or per month, depending on what's most appropriate for a recipients' project (e.g., if a recipient employs mostly seasonal workers or has subrecipients that only participate in the project or report on project involvement for a certain number of months, they may choose to calculate FTEs per month). See below for suggested calculation options.

Calculating FTEs per year

Generally, 2,080 hours per year is standard; however, recipients can refer to state/local policy codes to approximate standard FTE hours.

Step 1: Determine number of labor hours resulting from project activities for the year.

Step 2: Divide result of step 1 by the total standard FTE count of hours per year.

Calculating FTEs per month

Step 1: Determine the number of FTEs who work 30+ hours per week per month during the measurement period.

Step 2: Determine the total part-time and seasonal hours worked per week per month during the previous year and divide by 120
Step 3: Add up the subtotal in steps 1 and 2, then divide by 12 to determine the number of FTEs.

DATA COLLECTION CONSIDERATIONS

The recommended data collection strategies assume that projects will determine a valid proxy for number of people reached and the number of people who demonstrated behavior changes based on outreach or marketing activities. AMS must acknowledge that many outreach or marketing activities rely on estimates to determine reach and behavior changes, especially impact of on-air methods.

AMS must review proposed proxies and methods for estimation as a part of the grant application process. AMS should help projects identify which knowledge and behavior change indicators are relevant to proposed activities, and require projects to identify what data they will use to report number of people reached and changes in stakeholder behavior.

ESTIMATING NUMBER OF PEOPLE REACHED

IN-PERSON AUDIENCE (E.G. EDUCATIONAL WORKSHOPS, PRESENTATIONS, CONFERENCES, ETC.)

Projects can estimate reach for in-person audiences by tracking attendees via sign-in sheets, digital registrations, RSVPs, completion of pre-event surveys, etc.

DIGITAL PLATFORMS (E.G. SOCIAL MEDIA SITES, WEBSITES, BLOGS, ETC.)

Projects can estimate reach of digital platforms by tracking unique browser websites visits, subscribers, clicks, views, shares, reads, etc. This digital engagement can be analyzed via free web analytics tools such as Google Analytics and Facebook for Business. For outreach through online radio/TV/podcasts, projects can track streams through websites and applications.

ON-AIR METHODS (E.G. RADIO, TV, ETC.)

Projects can estimate reach of on-air methods by relying on station/studio estimates of reach, and/or the average number of listeners/viewers the station has for the day and time the outreach airs. Audiences can be more selectively targeted according to geographic location and the station format (e.g., a pop radio station will target younger populations than a public radio station). Methods for increasing reach include advertising over longer periods of time and multiple times a day, using short-duration commercials, and using a variety of stations/methods. Projects have the option to invest in media planning software tools that help estimate reach based on information such as advertising type, launch location, rating/popularity of radio/TV etc.

PRINT METHODS (E.G., NEWSPAPER, MAGAZINE, PRINT ADS, ETC.)

Projects can estimate the reach of print methods by looking at the geographic coverage areas and associated populations, newspaper/magazine ratings/subscribers/average number of readers/etc. Other print methods, such as print ads and infographics, can be estimated through methods such as number of households receiving the outreach, Quick Response (QR) codes, average number of people exposed to the print ad location, or number of outreach handouts taken at a farmers market or other access points. Projects have the option to invest in media planning software tools to help estimate based on information such as advertising type, launch location, rating/popularity of magazine/newspaper, etc.

ESTIMATING BEHAVIOR CHANGE

Methods used by projects to measure if stakeholders demonstrated desired behavior changes will vary depending on the type of outreach or marketing activity and the intended impact of that activity. Some strategies are listed below. Projects may need to estimate behavior change as a percentage of overall audience reached based on data collected via the methods below, or other data collection methods.

SURVEYS

For in-person audiences, pre- and post- surveys should be conducted either during the in-person event or via email, phone, or other method after. Where appropriate, such as for measuring consumption changes and increased engagement with producers/access points, projects should follow up with surveys after the event to allow time for respondents to change their behavior. In-person surveys can also be useful to census consumers at market access points, when feasible. Digital, on-air, or print outreach can direct audiences to unique website addresses, QR codes, phone numbers, etc. to track the number of individuals gaining knowledge or acting on knowledge. Projects can incentivize participation in surveys through promotions, coupons, discounts, etc. as appropriate and allowable.

STUDIES

Projects can measure the impact of their outreach method and message on all behavior change indicators through marketing studies. Study examples may include surveying test audiences, comparing sales, consumption, or other desired metric in the locations where the outreach campaign was launched vs. similar demographic locations where the outreach campaign was not launched, etc. Once the effect on behavior has been measured, projects can estimate impact based on a percentage of overall audience reached.

MEASURING DIGITAL TRAFFIC

Projects can track clicks to an article/website and time spent reviewing the digital content of interest with the tracking methods outlined under the digital platforms section above. Projects can track the number of viewers that stay on a website/article for the estimated article reading time to approximate engagement with specific content. Additionally, tracking clicks and traffic to online points of sale can provide insight into the relationship between digital content and impact on sales/consumption.

TRANSACTIONS

Outreach targeting consumption should direct consumers to online, phone, in-person, or other mediums where projects can track transactions, number of conversions from shopper to buyer, average purchase amounts, number of orders added to online shopping carts, etc. Outreach can direct consumers using unique website addresses, phone numbers, QR codes, etc. that can only be attributed to the outreach method to estimate impact. Projects can additionally compare consumption before and after an outreach campaign is launched to estimate efficacy. Sales receipt questionnaires can be used by projects in brick-and-mortar stores to track consumers that engaged with the outreach method.

RETURNING VISITORS

Projects can track returning online visitors to websites, social media posts, store locators (to estimate in-person visitors), or other online location promoted through the outreach via unique browser visits, as outlined under the digital platform section above. For in-person visitors, projects can track visits to markets, farms, or other locations through sign-in sheets, online registrations, etc. In-person tracking methods should ask how the visitor heard of the location to measure engagement with the outreach method. Projects can also compare website traffic and in-person visits before and after an outreach campaign is launched to estimate impact.

DEFINITIONS

ADDITIONAL

Added, extra, or supplementary to what is already present or available. Intended for projects to measure “additional” via estimating a baseline and note if an increase occurred as a result of grant activities.

ADULT

Person 18 years or older.

BEST PRACTICE

A procedure that has been shown by research and experience to produce optimal results and that is established or proposed as a standard suitable for widespread adoption.

CHILD

Person under the age of 18.

COLLABORATION

Cooperation with a person or an organization unaffiliated with the applicant in the conduct of the project and is not immediately connected to the management of the project.

CONSUMER

An individual who ingests or uses an industry-related product, including buying in bulk.

CONSUMPTION

The ingestion or use of an industry-related product, including buying in bulk.

FOOD SAFETY PLAN

Provides a systematic approach to the identification of food safety hazards that must be controlled to prevent or minimize the likelihood of foodborne illness or injury. Plans should be updated on the most up-to-date food safety and/or other market access prerequisites.

INTEGRATED PEST MANAGEMENT

An effective and environmentally sensitive approach to pest management that uses current, comprehensive information on the life cycles of pests and their interaction with the environment combined with available pest control methods to manage pest damage by the most economical means, and with the least possible hazard to people, property, and the environment.

INTERVENTION PRACTICES

Involves the addition of control measures into a process to reduce, and ultimately, prevent or eliminate food safety risks. Intervention practices should include updating strategies according to on the most up-to-date food safety/other market access prerequisites.

JOBS

Refers to a paid position of regular employment (including seasonal workers) directly aligned to the agricultural industry. Does not apply to grant administrative positions or positions contingent on grant funding. Projects can count jobs according to the number of full-time employees (FTEs) within an organization, in collaboration with other organizations, and/or on behalf of other partner organizations. FTEs can be calculated based on the average number of hours worked by an FTE per year or per month, depending on what’s most appropriate for a project (e.g., if a recipient employs mostly seasonal workers or has subrecipients that only participate in the project or report on project involvement for a certain number of months, they may choose to calculate FTEs per month). See below for suggested calculation options.

- **Calculating FTEs per year:** Generally, 2,080 hours per year is standard; however, recipients can refer to state/local policy codes to approximate standard FTE hours.
 - Step 1: Determine number of labor hours resulting from project activities for the year
 - Step 2: Divide the result of step 1 by the total standard FTE count of hours per year
- **Calculating FTEs per month:**
 - Step 1: Determine the number of FTEs who work 30+ hours per week per month during the measurement period
 - Step 2: Determine the total part-time and seasonal hours worked per week per month during the previous year and divide by 120
 - Step 3: Add up the subtotal in steps 1 and 2, then divide by 12 to determine the number of FTEs
- **Jobs “Created”:** Refers to a new position developed as a result of grant activities that is not contingent on grant funding.
- **Jobs “Maintained”:** Refers to jobs sustained as a result of grant activities, despite adverse seasons (such as an economic recession, etc.). Jobs “maintained” are also not contingent on grant funding.

MARKETING

Promotion with the goal of increasing buyer engagement, sales, etc.

NEW

Unique; used, implemented, or acquired by an organization for the first time; new to the industry or existing but newly applied to an organization, stakeholder, or other project-related entity.

OUTREACH

Promotional activities or communications related to education, knowledge sharing, etc.

PROJECT

A project is a set of interrelated tasks with a cohesive, distinct, specified, and defined goal. It follows a planned, organized approach over a fixed period of time and within specific limitations (cost, performance/quality, etc.). Additionally, a project uses resources that are specifically allocated to the work of the project and usually involves a team of people.

SUSTAINABILITY BEST PRACTICES

A procedure that has been shown by research and experience to produce optimal results and that is established or proposed as a standard suitable for widespread adoption that focuses on water, soil, biodiversity, reduced inputs, food waste reduction, and other uses. For further reference, NRCS defines best management practices to include soil and water conservation practices, other management techniques, and social actions that are developed for a particular region as effective and practical tools for environmental protection.

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