

# IOIA Annual Report 2015

Prepared March 1, 2016 by Stuart McMillan, IOIA Board Chair  
and Margaret Scoles, IOIA Executive Director

**Year 2015** was one of ambitious goals attained, a stride forward in financial stability, an extraordinary and visionary Annual Meeting, and of new and continued successful collaborations. IOIA focused energies on three major projects that furthered the three arms of IOIA's mission and diversified funding.

First, the successful completion of a contracted project funded by the USDA Sound and Sensible initiative brought in \$106,000. This was one of the largest projects IOIA has completed. The outcome was a significant contribution of publicly available resources (including training resources, on-line self-directed learning modules, and videos) that **promote consistency and integrity in the organic certification process**. Making organic certification more accessible, attainable, and affordable involves collaboration with many partners across the country and around the globe. To support this work, in September 2014 the USDA Agricultural Marketing Service's (AMS) National Organic Program (NOP) awarded 14 project contracts to organizations, including IOIA, with the goal of advancing the NOP's Sound and Sensible initiative. Each team had one year to complete their projects – all aimed at identifying and removing barriers to certification and streamlining the certification process. AMS/ NOP started launching these new resources in a series of releases, based on a common theme. The first launch was November 9, 2015, highlighting the *Organic Value Proposition: Why Go Organic and Where to Start*. The second launch was on January 6, 2016, around the theme of *Understanding Rules, Certification, and Inspections*. This launch included two IOIA-produced videos, one demonstrating a sample crop inspection and the other a sample livestock inspection. IOIA staff and contractors put in many, many hours to create these great resources that are now available to the public. These educational resources are free for the use of organic inspectors as well as consultants, certification agencies, producers, and slaughter house managers. Other IOIA-produced resources yet to be launched include a self-directed on-line learning tool for organic slaughter certification, an inspection guide, and training materials focused on sound and sensible recordkeeping verification and technical assistance.



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The second arm of IOIA's mission is **to provide quality inspector training**. In a very busy project year where IOIA "cut back" our training program, 41 separate events trained 674 people (an increase of 13% over the previous year) in three languages. When the Food Safety Modernization Act was finalized in 2015 in the US, IOIA was prepared to train and again drew from public funding. IOIA developed and delivered on-farm food safety trainings, working with a regional partner, Mission Mountain Food Enterprise Center, and grant funds through the Montana Department of Agriculture Specialty Crop program. The intended audience was organic inspectors, others interested in verifying food safety, and farmers. Sixty people participated in these trainings. In the first year of this two-year project, IOIA recouped all of the previous investment made in 2014 and also contributed significantly to 2015 earnings.

And third, IOIA successfully completed an ambitious project **to address issues and concerns relevant to organic inspectors** in response to concerns arising from the implementation of USDA NOP Certifier Instruction 2027 *Personnel Performance Evaluations*, which asks for field evaluation of every inspector annually. Both certifiers and inspectors had expressed concerns about the added cost in money and time to implement field evaluation of every inspector, every year. IOIA supports the value of more rigorous field evaluation to improve inspection consistency and quality. However, IOIA also had concerns about the potential negative impact of 2027 on independent contractors, especially those who work for multiple certifiers, if each certifier is required to do a separate evaluation. Many IOIA members are part-time inspectors and most work for more than one certifier.

IOIA created and launched a pilot Peer Evaluation Program to keep inspectors working and enhance inspection quality. NOP 2027 states the field evaluation can be performed “by a supervisor or peer (another inspector)”. IOIA’s program was largely due to countless hours of a volunteer committee, chaired by IOIA inspector members Al Johnson and Lois Christie. IOIA created a mechanism for peer evaluation and sharing Peer Evaluation Reports among multiple certifiers. An evaluation tool, evaluator list, program procedures, and evaluator training were developed. In 2015, a total of 51 inspectors were evaluated by nine peer field evaluators for ten certifiers, who contracted for a total of 99 evaluations. Certifiers and inspectors were surveyed in the evaluation of the pilot program. Thirty-nine (72.5%) of the inspectors evaluated responded to the post survey. An impressive 92% of those inspectors found the program useful. And all 10 participating certifiers responded and said “yes” to whether they would participate again. Nine of 10 answered “yes” to finding the program user friendly. And nine said “yes” to “Was the Peer Field Evaluation Report informative, useful, and adequately detailed?” A bonus for involving certifiers in the shaping of the pilot program was enthusiastic participation by certifiers and an unexpected and welcome boost to IOIA’s bottom line. IOIA had not budgeted to gain revenue from the program, and only strived for a break-even.



Ib Hagsten, BOD Chair, presents a ‘Friend of IOIA’ Award to Al Johnson at the 2015 AGM for his work on Peer Evaluation.

IOIA has submitted the final report on the pilot IOIA Peer Field Evaluation Program to the NOP. In that report, IOIA requested written confirmation from NOP that certifiers may use the IOIA Peer Field Evaluation Program again in 2016 to meet the requirement for the field evaluation aspect of inspector performance. And, also, it asks that if 2027 is revised, to include by reference the IOIA Peer Field Evaluation Program as one of the options to meet the requirement for annual field evaluation.

Answer Choices -to “How was the evaluation useful?”	Responses -
Satisfied the requirement of NOP 2027 so that I could continue working as a contract inspector.	91.67% 33
Provided useful tips and ideas on how to do inspections better.	55.56% 20
Increased my understanding of specific NOP regulations.	27.78% 10
Avoided having so many certifier evaluations.	44.44% 16
Total Respondents:	39

### **Most of the inspectors evaluated found the evaluation useful.**

Outcomes of the pilot program were shared with certifiers at the annual training of the Accredited Certifiers Association in Georgia. Al Johnson and Margaret Scoles participated in a panel presentation with three certifier representatives. All three had used a combination of IOIA’s program and their own in-house evaluation to evaluate their inspectors in the field. *“Preliminary Summary of IOIA Peer Evaluation Program Findings and Observations based on Peer Field Evaluation Reports – Trends in areas where inspectors scored lower”*, was shared at that training. Learnings from the program were also shared with inspectors at Advanced Organic Inspector training in Ontario, *“Top Ten Learnings from the IOIA Peer Evaluation Program 2015.”*

The average overall score for 50 reports in 2015 (based on 0 to 5) was 4.71. This can be interpreted as the program finding inspectors 94.2% “compliant”. This is encouraging. However, further analysis of reports identified 2015 Annual Report, March 1, 2016

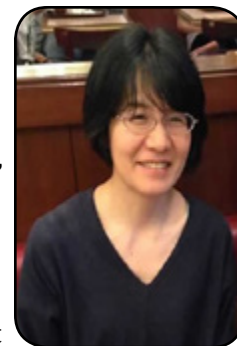
areas where inspectors most often scored lower than 5. This summary of observed trends can help certifiers identify areas where inspectors may need direction or remediation and where IOIA can be proactive with more training.

Based on the success of the program, the proven viability of the business plan, and positive feedback from both inspectors and certifiers, IOIA plans to continue to offer this program in 2016.

**IOIA, an international organization with global impact, at work -**

**Spotlight on Asia-Pacific** – With BOD member Isidor Yu as liaison, Mutsumi Sakuyoshi of Japan stepped up to chair the first Asia Committee in 2014. The committee soon requested a name change – to the Asia Pacific Committee. Members of the committee are from Korea, Nepal, India, Australia, Thailand, and Japan.

The committee has worked hard preparing for and promoting IOIA’s first-ever Annual Meeting in Asia – on Jeju Island, REPUBLIC OF KOREA on April 9, 2016. Raymond Yang chairs the organizing committee. Both Raymond and Isidor promoted the events at expos in Korea and at BioFach in Germany. The Japan Organic Inspectors Association (JOIA) also continues to support IOIA through membership and continues to lead IOIA/JOIA cosponsored trainings.



*Mutsumi Sakuyoshi  
IOIA Trainer and  
Asia-Pacific  
Committee Chair*

Both farm and processing inspection trainings were delivered in Japan in 2015.



*Isidor Yu, far left, stands next to Mr. Zhou Zejiang (China), president of IFOAM Asia. Yu was promoting the AGM and associated training events at the ISOFAR 2015 Goesan – International Organic EXPO in Korea.*



*At the 2015 AGM, Isidor presents Ib Hagsten, BOD Chair, with a painting of Mt. Hallasan on Jeju.*



*Isidor Yu and Nanyoung Kim, both IOIA members, staffed a booth to promote IOIA at the International Organic Industry Expo 2015 in Seoul. This booth was donated by Raymond Yang, IOIA member, a co-organizer of the Expo.*

**Fiji** - IOIA worked with NASAA in Australia in collaboration with Pacific Organic and Ethical Trade Community (POETcom) to deliver training in Fiji. Luis Brenes, IOIA Trainer from Costa Rica, assisted by Kathe



Purvis from Western Australia, delivered an introduction to organic crop and processing inspection training based on the IFOAM Standards, with an added focus on how to inspect to multiple standards.

George Moli from the World Vision project in Vanuatu attended part of the training to learn about managing an organic certification system for the benefit of 600 farmers back home.



*Field Trip - Processing*

**“We support farmers in growing organic coconuts for sale and the focus is on improving their income levels to alleviate poverty,” he said. “Organics is helping them.” – George Moli**



**Spotlight on Canada** – In 2015, IOIA’s focus in Canada was on the revision of the Canadian Organic Standards rather than training, following a record year with four basic trainings and one advanced training in 2014. The standards are reviewed and potentially revised every five years. IOIA continues to participate on the Canadian General Standards Board’s Technical Committee on Organic Agriculture, with Kelly Monaghan of Ontario as IOIA’s representative. Kelly did an outstanding job of gathering input and questions from among the members. IOIA voted “no” on the first revision but supported the final version with a positive vote. Several other IOIA members are also actively involved on the standards committees.

The chief activity for the Canadian Committee was planning the 2016 Guelph Advanced Training. The Guelph Organic Conference in Ontario continues to be a key member networking event for members.

IOIA members were surveyed for advice on the location of the 2017 AGM, the BOD considered the responses, and the location is – Ottawa, Ontario, the capital of CANADA! IOIA anticipates engaging with the Canada Organic Office during this event.



*Kelly Monaghan,  
IOIA Accredited  
Inspector Member  
and CGSB Repre-  
sentative*

**Spotlight on Africa** – In 2015, Evans Kwaku Duah of Ghana was awarded the Organic Community Initiative Scholarship for 2016. This scholarship goes to a recipient with potential to have a positive impact on their regional organic community. Evans currently works for a European certification agency CERES GmbH. He learned about IOIA with the help of Mr. Kolja Braun, head of the CERES Africa (West- Africa) department.



*Evans Kwaku Duah  
OCIS Scholarship  
Recipient*

In his words, “I believe growing of organic movement in the near future is through the career of its inspectors in a positive diverse of sustainability which prolongs bio-diversity.”

**Spotlight on South America and Central America** – Three Spanish language basic farm inspection trainings were held in Latin America (Ecuador, Costa Rica, and Mexico). In addition, IOIA cosponsored Advanced training in Spanish with Agricert, a supporting certification agency member, in Mexico. For that training, a significant number of IOIA in/out balance training materials were translated into Spanish.

IOIA invested in professional translation into Spanish for the Sound and Sensible videos.

Spanish versions are yet to be released publicly.

A lower membership rate for Latin American and African members, implemented for 2015, has increased member retention in Latin America.

Big news in 2015 was the scheduled implementation of Mexico’s organic regulation, which had been published in October 2013 with a two year implementation period. However, full implementation has been delayed one more year until 2016. IOIA is responding to the need for training in Mexico that comes with the new regulation.



*In-house Basic Farm training for Berry-  
Mex in Mexico, Nov. 2015.*



*Spanish language Advanced course Focuses  
on In-Out Balance, cosponsored by BioAgricert,  
Mexico, Sept. 2015.*

IOIA is now hosting a discussion group of inspectors and others interested in promoting organic in Cuba.



*Mexico’s new  
organic seal*



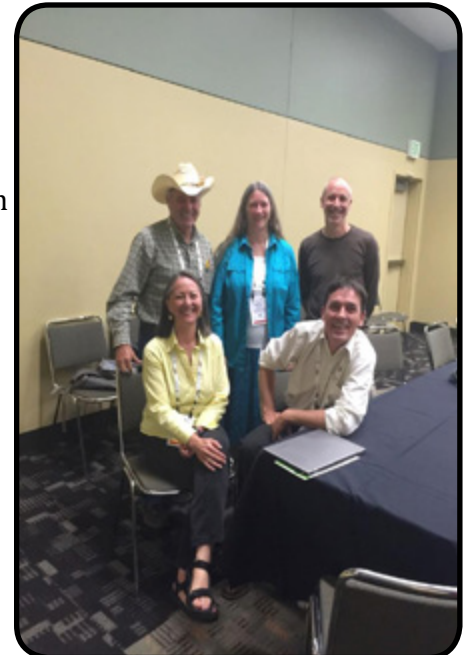
*Basic Farm Inspection Training, Barbados, June 2015, was cosponsored by Jamaica Organic Agriculture Movement and Organic Growers and Consumers Association.*



*All IOIA basic trainings have a field trip component and report writing assignments. Photo from Barbados.*

**IFOAM North America** – During 2015, IOIA participated on the Steering Committee aiming to organize a regional affiliate structure of IFOAM – Organics International. IOIA contributed Margaret Scoles, Executive Director as a Steering Committee member, and a portion of staff time for Sacha Draine, International Training Manager. IOIA has been a staunch supporter and affiliate of IFOAM for over 20 years. IOIA has participated in several IFOAM General Assemblies – most recently in Korea in 2011. IOIA and IFOAM share joint copyright on the IFOAM/IOIA International Organic Inspection Manual (published in 2000 in English, Spanish, and French). This manual remains the standard textbook for all IOIA basic courses around the world.

IOIA assisted with surveys. First, all English-speaking countries in North America and the Caribbean were surveyed to assess the level of interest and support. Initial results were very encouraging, although not all members responded. Following the Baltimore meeting, another survey was done in an attempt to achieve whether a majority of members in the region supported this move. By the close of 2015, it was not yet clear whether there was enough support. And more important, is there enough critical energy to support another organic structure in North America?



*Steering Committee in Baltimore, Maryland in September was attended by Bob Quinn (Kamut International and certified organic farmer), Margaret Scoles (IOIA), David Gould (IFOAM), standing in photo from left to right, Peggy Miars (OMRI and IFOAM World BOD) and Stuart McMillan (IOIA and certified organic farmer), seated.*



*The committee drafted Rules of Procedure and analyzed survey results.*



# IOIA Mission - How did IOIA address issues and concerns relevant to organic inspectors?

**IOIA's Peer Field Evaluation Program** played a key role in the industry-wide response to the NOP Certifier Instruction 2027 *Personnel Performance Evaluations*. Development of this program involved many hours of committee work and staff support, including multiple communications directly with the NOP. Lars Crail, NOP Lead Auditor and former organic inspector, was a member of the committee. The new program prevents duplication of effort and expense in the organic sector; keeps contract inspectors on the lists of multiple certifiers, and helps satisfy the NOP's requirement for annual field evaluation of all inspectors. One IOIA member was requested by eight certification agencies! Other members were evaluated at the request for five or more certifiers. IOIA regained and gained some members as a direct result of the program. When these non-inspectors were evaluated, they recognized the value of IOIA's work beyond providing them with the basic training to become an entry-level inspector. The success of this program is testament to how an idea from an AGM and members willing to roll up their shirt sleeves can have a major and positive impact on our community.

*"I found the IOIA Peer Evaluation process to be the most educational experience I've had in a long time. We have talked about doing shadow inspections as long as I've been involved in IOIA and now it's finally here. It's great to learn directly from others in the field. The peer evaluator voiced improvement points in our evaluation exit meeting. They are valid points that I can now improve on."* Christopher Kidwell, IOIA accredited inspector, past IOIA Membership Committee Chair, and Past BOD Member.

**IOIA's Accreditation Program** is nearly as old as IOIA. The Accreditation Committee was named as IOIA was founded. The Program was adopted by the membership in 1994. It was well-thought out and it has stood the test of time with very little change. Even so, it unfortunately remains a voluntary program with low participation and little recognition among certifiers. A newly envisioned Accreditation Program for IOIA was presented at the 2015 AGM after brainstorm sessions and consensus building among the BOD, trainers, and Accreditation Committee. The new structure was enthusiastically endorsed in principle by the membership.

The new model proposes a continuum of training through inspector credentialing that would replace the current voluntary program. It starts with prerequisite education, on-site classroom training, field training with mentors, and finally results in an entry-level inspector who is ready for 100-level inspections. These inspectors who successfully complete basic training and field training would hold a 100-level certificate with no expiration date. They would be "certified" rather than "accredited". Inspectors at the 200-level and 300-level would hold certificates with expiration dates. Renewal would probably be required every 3 years for 200-level and 5 years for 300-level inspectors. Exact requirements are still in development. To meet the requirements for renewal, inspectors would need to complete a minimum number of level-appropriate continuing education and a minimum number of inspections. In addition, peer evaluation would be required as part of the program. The current Peer Evaluation Program is expected to fold into the new Accreditation Program.

The new Field Training concept provides one way to make apprenticeship accessible to all inspectors. Lack of access to mentors has continued to plague new inspectors in most locations. IOIA's Apprenticeship Program was envisioned, formalized, and published in 1998. Its chief drawback was that certifiers were unwilling to participate in funding and the result was that the program was never implemented. It was used as a guideline only. Lisa Pierce, IOIA Trainer from British Columbia, presented one of those concepts to the annual meeting. Her concept was largely based on the IOIA Apprenticeship Program that was published in 1998, and the program was supported by the Certified Organic Associations of British Columbia.

This new program has the potential to change the profile of inspectors dramatically, with seasoned, experienced inspectors holding a higher level of certificate and being recognized as competent to do more complex inspections. Peer Evaluators are required to be accredited.



**IOIA's very well attended Annual Meeting at Chico Hot Springs**, the first ever in Montana, was a full day of events including a welcome from The Honorable Senator Jon Tester of Montana, a certified organic farmer, via DVD; introduction to Korean food with restaurateur I-Ho Pomery who dressed in traditional Korean garb and explained the dish of bibimbap before serving it as supper; a fundraising auction; and great fiddle music. A topic of keen interest to the members was the budding Peer Evaluation Program. Graduate students Alison R. Kent (Colorado) and Sara Miller Chonaiew (Oregon) presented a study of organic inspectors by graduate students, *"Inspectors in the U.S. Organic Food Industry: Characteristics, Roles, and Experiences"*, published Nov. 2014. This may be the first presentation of a research paper focusing on organic inspectors at an IOIA event and was certainly the first to refer to inspectors as "street-level bureaucrats".



Senator Tester

### Field Trips

Wendy Paulsen is presented with a door prize – a 50% discount for an IOIA webinar by Emery, son of Patti Bursten-Deutsch.



Amaltheia Dairy hosted a tour of goat dairy, swine, high tunnels, and their goat cheese plant. Becky Weed and David Tyler of Thirteen Mile Lamb & Wool hosted a tour of their wool processing facility. Becky also spoke at the advanced training on the challenges of raising sheep organically.



The naturally warm waters were divine. Al Johnson and Ib Hagsten soak and talk shop.



Above: Ona Magaro, glass artist; Monique Scholz, proud buyer of one of the top selling items in the auction (center); and proud father and IOIA's favorite auctioneer/ inspector, Brian Magaro.



Group Photo on the steps of the Chico Conference Center.



Left: Chair Ib Hagsten presents Chris Kidwell, Accredited Member and IOIA advocate and volunteer, with a "Friend of IOIA" award at the AGM for 10 years of service on Membership and Nominations committee.



## Other key membership activities and alliances –

**IOIA Membership – the opportunity to participate in the voice of inspectors.** In 2015, IOIA Inspector Membership increased by 7%.

**Certifier-Inspector Dialogue** conference calls were hosted every three to four months by IOIA. The ongoing dialogue is invaluable in shaping the training program and addressing inspector issues and member concerns. The calls engaged certifiers especially in the development of the Peer Evaluation Program and the new Accreditation Program model. All certifiers, including both IOIA members and non-members, are welcomed to participate. The IOIA Chair and Vice-Chair and the coordinator of the Accredited Certifiers Association are invited to all calls. Other guests are invited when germane to specific topics (i.e. National Organic Standards Board Chair).

Accredited Certifiers Association continues to be a key partner in IOIA's work. ACA was a partner in IOIA's Sound and Sensible contract; reviewing materials from the certifier's angle and contributing many hours to the drafting of an innovative Inspection Guide. IOIA participated in the ACA Annual Training and Meeting in Little Rock, Arkansas; presented the concept of the Peer Evaluation Program; and sought and received certifier perspective.

**The IOIA Forum** is an on-line discussion group open to all inspector members. Inspectors can ask for advice and perspectives from other inspectors and share good resources. Discussion topics can range from new boiler additives to where to find current organic standards for India.

**The quarterly IOIA newsletter, The Inspectors' Report**, included three technical articles and other contributions by inspector members. IOIA's Technical Editor, Tony Fleming, writes, edits, or reviews articles for publication. In 2015, he wrote a two-part article *"Inspector Compensation – Are Inspectors Charging Enough? The Answer Depends on How Well you Understand Your Costs"* in response to a thread on the IOIA Forum. In recognition of 2015 as The International Year of the Soil, he wrote *"Assessing Soil Quality in the Field: Common Indicators and Their Interpretation"*. Fleming provided inspectors with practical in-the-field soil assessment tools and information. Fleming holds a B.S. Geology and M.S. in both Geology and Water Resource Management.

Lois Christie reported on the new Mexican organic regulation.


The Asia Pacific Committee provided two newsletter articles on equivalency. Mutsumi Sakuyoshi contributed *"Report from Japan – Equivalency"* focusing on the Japan Agriculture Standard (JAS). Isidor Yu wrote *"Organic Equivalency Policy of Republic of Korea"*.

All IOIA members receive the newsletter digitally (since 2014). They can opt to pay extra for a hard copy. The on-line email service provides useful statistics about how many members are reading the newsletter.

Diane Cooner, IOIA Newsletter Editor living in Costa Rica, has been publishing the newsletter for IOIA since 1994 – 23 years! She also moderates the IOIA Forum and manages the IOIA website.



*Lois Christie, bilingual inspector, IOIA member, educator, consultant, and advocate working primarily in the US and Mexico.*



THE

# Inspectors' Report

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**IOIA-produced Videos now on NOP site as part of Sound & Sensible Initiative**



## IOIA Mission - How did IOIA provide quality inspector training?

IOIA training continues to increase in diversity and global recognition. IOIA sponsored in-person training in Barbados, Japan, Ecuador, Costa Rica, Mexico, Fiji, and in the USA - Montana, North Carolina, Oregon, and Iowa. Most of these trainings have a regional cosponsor, often a certification agency or other regional organic group. All training events are reported in the IOIA newsletter, with Spanish language articles for all trainings in Latin America.

IOIA trained 674 people in 2015. About half were trained in-person.

**Webinar enrollment increased by 46% for 100-level webinars, 15% for 200-level webinars, and 26% for 300-level webinars.** Nineteen webinars were delivered, representing 46% of the people trained in 2015.

In-house training by webinar is an increasingly popular format. Five webinars took training to two Australian certification agencies in a collaborative effort among IOIA, NASAA Certified Organic (NCO), Australian Certified Organic (ACO), and Organic Materials Review Institute (OMRI). The 200-level IOIA/OMRI Livestock Inputs Webinar was delivered to ACO and NCO. It was also delivered in collaboration with

Ohio Ecological Food and Farm Association (OEF-FA) in the US as part of a SARE-funded project to introduce livestock professionals, including veterinarians, to inputs allowed for organic livestock production. Year 2015 was the second year of a two-year project.

IOIA continues to make rigorous training accessible and affordable to inspectors via webinar format. New webinar topics included a new 200-level webinar



**Field Training - Matt Miller, inspector member and president of training cosponsor Iowa Organic Association, was a Group Leader for a field trip in Iowa.**



**Trainers Margaret Scoles and Jonda Crosby with the IOIA/OTCO cosponsored basic Crop Inspection Training group at Oregon State University.**

- In/Out Balances and Traceability Tests for Crop Inspection under NOP and COR. The 300-level In/Out Balances and Traceability Tests for Processing Inspection under NOP and COR was also delivered for the first time in 2015. It challenges the most experienced inspector.

A new and improved 200-level Biodiversity and Natural Resource Assessment on Organic Farms was delivered by IOIA trainer Garry Lean with assistance from Sarah Brown of OTCO/NRCS and JoAnn Baumgartner of Wild Farm Alliance. A new record for an IOIA webinar - 34 participants! Timing was good, with the new NOP Draft Guidance on Natural Resources and Biodiversity Conservation published in 2015.

IOIA and OMRI continued collaborative training on inputs to all three scopes and to both NOP and COR. In 2015, two 200-level webinars on Livestock Inputs were delivered. IOIA bid farewell to OMRI's Lindsay Fernandez-Salvador with the first webinar and welcomed Johanna Mirenda in her place for the second.



**Trainer Stanley Edwards with participants of the IOIA basic Processing Inspection Training in Flat Rock, North Carolina.**

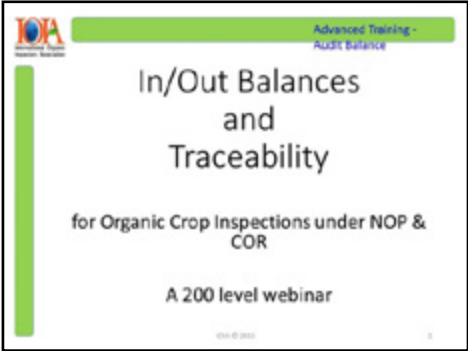
### In-person training activity by language:

Basic Crop Inspection Training	- 1 Japanese, 3 Spanish, 4 English
Basic Processing Inspection Training	- 1 Japanese, 2 English
Basic Livestock Inspection Training	- 1 English
Advanced Organic Inspector Training	- 1 Spanish, 1 English

**Non-GMO Verification Training** was made available to organic inspectors via webinar through collaboration with FoodChain ID for the first time in four years.



**A feature of all IOIA basic trainings – FUN. “I knew I’d learn a lot and I knew I’d work hard, but I never knew it would be so much fun!” – from a recent participant. Photo from basic training in Barbados.**



**Other customized trainings:**

- **Technical Service Provider and Biodiversity Training**, a 300-level course, was delivered in Oregon in collaboration with OTCO and NRCS. This training helps organic inspectors qualify for an additional work opportunity.
- Stanley Edwards, IOIA Trainer, prepared and delivered a one-day **NOP Processing Standards Workshop** in collaboration with Utah State University to 20 participants.

<b>IOIA Training in 2015</b>		
<b>Type of Course</b>	<b>Number of Events</b>	<b>Participants</b>
Basic Crop	8	144
Basic Livestock	1	15
Basic Processing	3	46
Advanced	2	52
Webinars (100 level)	10	144
Webinars (200 level)	7	117
Webinars (300 level)	3	27
Standards Workshops (in-person)	1	20
Non-GMO Verification (webinar)	1	19
On-farm Food Safety (in-person)	3	62
Technical Service Provider	1	8
Introduction to Organic Inspection	<u>1</u>	<u>20</u>
	<b>Total 41</b>	<b>674</b>

Basic GAP On-Farm Food Safety Training and Regional Independent Verifier Certification training continue to be led by IOIA’s Training Services Director, Jonda Crosby. Produce Safety Plan Workshops for farmers were also developed in 2015, for delivery early in 2016 in Montana. The workshops were designed for fresh produce growers to help them develop on-farm food safety GAP plans. The workshops are geared for those who are exempt from the Food Safety Modernization Act (FSMA) Produce Rule. The workshop is useful to all fresh produce growers, as well as buyers of produce, and educators working with growers of fresh produce.



# Sound and Sensible – a training project that put IOIA on the map.

**USDA ORGANIC** **Sound & Sensible**

In 2014, the National Organic Program's (NOP) Sound and Sensible initiative funded 14 year-long projects across the United States aimed at making organic certification more accessible, attainable, and affordable while maintaining high standards, ensuring compliance, and protecting organic integrity. Project leads worked directly with organic farmers and businesses to identify and remove barriers to certification, streamline the certification and recordkeeping process, and conduct education and outreach.

**14** projects and organizations

**Sound & Sensible Principles**

- Efficient Processes
- Streamlined Recordkeeping
- Practical Plans
- Fair, Focused Enforcement
- Integrity First

**44** public-facing products

The Sound and Sensible projects have resulted in a trove of valuable tools, guides, and training materials. These resources will benefit the broader organic community, including the nearly 20,000 certified organic producers and processing facilities across the United States. Many of the projects focused on outreach to underserved communities, such as non-native English speakers and Plain/Amish communities, about the benefits of organic certification.

**Product Topic Areas**

Organic System Plans	3
Recordkeeping	5
Organic Value Proposition	6
Inspections	6
Producer Group Processes	3
Certification	16
Standards/Implementation	7

**Types of Products**

75	16	15
tip sheets / fact sheets	training workshops & curricula	informative videos

**Acronym Definitions:** ALBA - Agriculture and Land-Based Training Association; IOIA - International Organic Inspectors Association; NOFA VT - Northeast Organic Farmers Association Vermont; OEFFA - Ohio Ecological Food and Farm Association; PA - Pennsylvania; WSDA - Washington State Department of Agriculture

## Project Partners – “What to Expect at Organic Inspection” videos



NCAT's Rich Myers was the patient project videographer.



Ken Mugg of Tallapoosa, Georgia hosted the live-stock inspection video.



Shaheed Harris and Fathiyyah Mustafa at Asya's Organic Farm, South Carolina, hosted the crop inspection video.

## “Organic Slaughter Certification” learning module



The on-line learning module for slaughter house organic certification has not yet been posted by the NOP. When it becomes available in final form, it should improve access of livestock producers to certified organic houses. It includes a recorded webinar on livestock standards and video clips of a staged organic slaughter house inspection. It is self-directed so livestock



producers, certification agency staff, inspectors, and slaughter house managers can go at their own pace.



**Partner Brian Engle of Pioneer Meats, Big Timber, Montana**



**Partner Wes Henthorne of B Bar Ranch, Big Timber, Montana**

## IOIA Mission - How did IOIA promote consistency and integrity in the organic certification process?

**Partnerships:** IOIA participates on a global scale by maintaining affiliate or supporting memberships in like-minded organizations, such as IFOAM – Organics International, the Accredited Certifiers Association (ACA), the Organic Trade Association (OTA), and the Montana Nonprofit Association. IOIA’s Executive Director and BOD Chair participated in the OTA AGM in Baltimore. The Executive Director attended the ACA Annual Meeting, which is a key networking event and training incubator.

Trainings are cosponsored with certification agencies (i.e. Oregon Tilth, EcoLOGICA), non-governmental organizations (i.e. Iowa Organic Association in the US, Organic Growers and Consumers Association in Barbados, and Canadian Organic Growers), governmental bodies (i.e. AGROCALIDAD, the National Competence Authority of Organic Agriculture in Ecuador), educational institutions (i.e. Utah State University), and inspectors’ organizations (i.e. JOIA). Some webinars also have cosponsors. The Canada Organic Trade Association continues to cosponsor the 100-level COR Processing Standards webinar. Their support enhances enrollment by increasing press and draw-



ing in more participants from the wider organic sector. IOIA and OMRI are developing COR Inputs webinar update training to respond to the recent Canadian standards revision.

The National Center for Appropriate Technology (NCAT) and ACA were partners in IOIA's Sound and Sensible contract. All resources that IOIA created for the USDA NOP will become publicly available, and all are aimed at making organic certification more attainable, affordable, and accessible.

**Policy Work:** In 2015, IOIA participated in two meetings of the National Organic Coalition in the US and the BOD made a decision to become a NOC affiliate for 2016. IOIA commented to the National Organic Standards Board in writing, via webinar comment once, and in-person twice. Year 2015 was an important one with a list of 175 materials up for Sunset Review for potential inclusion or removal from the National List. While in Vermont for the second meeting, Vice-Chair Ib Hagsten participated in the 25<sup>th</sup> anniversary party of the Organic Foods Production Act, sponsored by Vermont Organic Farmers.

**Promoting Organic** – IOIA gets big mileage from a modest annual promotion budget. New Hope Natural Media awarded IOIA free booths at both Expo West in Anaheim, California and Expo East in Baltimore, Maryland in 2015. Christopher Kidwell joined the Executive Director in staffing the booth at Anaheim. In addition to IOIA's value as a place where show-goers can ask difficult questions of experts, these shows are key networking events. The 200-level OMRI Inputs webinars were born at the Guelph Organic Conference a few years ago. Expo West in 2015 was the event that drew together the nucleus of the IFOAM North America Steering Committee. IOIA's Canadian Committee budgets for ongoing sponsorship of the Guelph Organic Conference.

In 2015, IOIA upgraded the promotional display for use at trade shows and trainings.

IOIA's Executive Director spoke at "Organic University" at the Montana Organic Association to producers and the technical service advisors on what to expect at an organic inspection and how to prepare and to agricultural extension agents at a Montana extension retreat on "Organic Opportunities".



**Chair Stuart McMillan staffs the January 2016 Guelph booth with the new IOIA display – featuring the most colorful version of IOIA's logo.**

## Finances

IOIA maintained a solid financial position and gained significantly in 2015, with an unprecedented positive bottom line of nearly \$83,000. Members enjoyed no dues increases for 2016, based on this strong year-end position. IOIA successfully diversified funding in 2015 with a combination of grants, contracts, training, membership, and fundraising. This year strengthened that ever-elusive third leg of financial sustainability – public funding support. The training program and membership have historically been the basis of most of IOIA's revenue stream. Grants and substantial contracts were few and far between. But the biggest financial gains that finished off the third leg of the financial sustainability stool were a result of some large, new, and successful projects. The largest was the Sound and Sensible work for NOP. The work was completed largely by current staff, trainers, and BOD, with a modest increase in support staff. Peer Evaluation, Food Safety training, and strong webinar participation were other significant factors.

In 2015, based on recommendation of the Finance Committee, the cash reserve was increased by 40%. The IOIA Audit Policy was also revised to include a wider range of options to a formal financial audit.

As Treasurer, Pam Sullivan scrutinizes the monthly bank statements, bank reconciliations, and financial reports. She engaged the Finance Committee in reviewing the draft budget for 2016 and the Committee recommended the budget to the full BOD. Details of the 2015 Financial Reports and the 2016 Budget will be presented by the Treasurer at the AGM. A highly successful fundraising auction at the AGM raised \$4055. 2015 Annual Report, March 1, 2016



**Pam Sullivan,  
Accredited  
Member and BOD  
Treasurer**

## **Committees:** Committee Reports will be available at the Annual Meeting.

BOD liaisons work with all IOIA Committees. A BOD liaison is a BOD member who communicates between the Committee and the IOIA BOD, supports the committee's work, and carries concerns and initiatives both ways.

The Board extends a sincere thanks to all of the IOIA members who have volunteered to be a part of IOIA's committee activity and for their accomplishments over the past year.

**Accreditation** – Christopher Warren-Smith, Chair (outgoing). Purpose: To oversee the inspector accreditation program including to review, adjudicate and propose policy and criteria used to accredit inspectors. To formulate accreditation standards and procedures. The BOD extends a big thank-you to Christopher for his work over the past 3 years to chair the Accreditation Review Panel.

**Accreditation and Accreditation Review Panel (ARP)** – In 2015, there were two accreditation renewals and one newly accredited member.

**Peer Evaluation Committee** is a subcommittee of the Accreditation Committee.

**Bylaws** – With the 2015 Board election, a bylaws change was implemented to improve BOD stability and to ensure staggered terms for BOD members. Terms for the Directors were increased from two to three years. The newly elected BOD worked out a strategy to implement the bylaws by assigning some Directors two-year and some three-year terms.

**Membership and Nominations** – Christopher Kidwell, Chair (outgoing at 2015 AGM). An excellent slate of candidates was offered for the 2015 election. Each year the Nominations Committee rises to the challenge of finding one or more candidates for every open position. IOIA bylaws limit eligibility of the BOD to voting members. As all past and current BOD members know, it is a big job for those who agree to stand for election. And it is a daunting task for the Nominations Committee to find willing candidates from among the IOIA inspector members.

**Latin American Committee** – Currently seeking a Chair. The purpose of this committee is to give voice to Latin American member concerns.

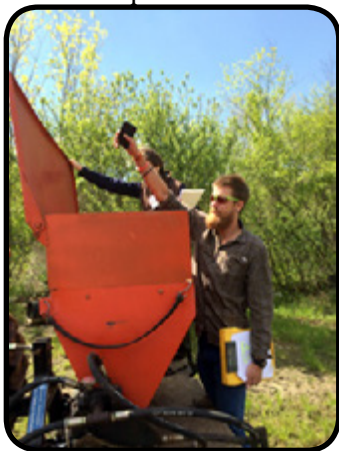
**Scholarship** – Margaret Weigelt, Committee Chair. The Committee is charged with annually reviewing applicants for the two IOIA scholarships. The recipients receive free tuition to an IOIA basic organic inspection training. Two scholarships were awarded in 2015. Evans Kwaku Duah of Ghana was awarded the Organic Community Initiative Scholarship. This award can only go to someone from outside the US or Canada. Arthur Bassett of Arizona, USA received the Andrew Rutherford Scholarship. Ariel Russell of California took the Basic Crop training in Oregon in 2015 with her 2014 scholarship.

**Ethics** – Joyce Ford, Chair. A criterion for membership is past board or alternate service. Created to deal with complaints received by IOIA based on the Codes of Ethics and Conduct. No complaints were filed in 2015.

**Arthur Bassett, 2015 Rutherford Scholarship recipient, in North Carolina at basic crop training (left) and in Haiti (right).**



**Eric Feutz, former BOD member, took over the reins of the Membership and Nomination Committee at the 2015 AGM in Montana.**





**Canadian** – Bill Barkley, Chair. Purpose: Give voice to Canadian members concerns. The Canadian Committee’s activities focus around providing advanced training in Canada, sponsoring the Guelph Organic Conference, sponsoring networking events, and maintaining conversations relevant to Canadian inspectors on the IOIA Canadian Forum. See also International and Training sections above.

**Editorial Review** – Joe Montecalvo, Ph.D., Chair Purpose: On-going as needed to review all IOIA publications and materials considered for sale.

**Finance** – Pam Sullivan, Chair. IOIA bylaws specify that the BOD Treasurer chairs this committee. The Finance Committee meets at least annually to make a budget recommendation to the BOD.

**Fundraising** – see also Finances above.



**Kelly Monaghan, Chuck Mitchell, Tom Cassan, and John Warner at the popular inspector networking event at Guelph University Centre’s pub.**

## Board of Directors in 2015

IOIA’s Board of Directors enjoyed continued stability following the re-election of both incumbents (Stuart McMillan, CANADA and Isidor Yu, KOREA) in 2014. Again in 2015, all four incumbent board members (Ib Hagsten, USA; Pam Sullivan, USA; Garth Kahl, USA; Margaret Weigelt, USA) agreed to run again and were re-elected. Amanda Birk (Pennsylvania, USA) was elected to fill the vacancy left by the resignation of Bill Stoneman (Wisconsin, USA) late in 2014. She was welcomed onto the board and immediately became fully engaged in BOD activities. However, the BOD regretfully accepted her resignation in January 2016 after she was promoted to a management position within PCO, a certification agency. IOIA BOD policy states that BOD members should not hold management positions or positions on boards with certification agencies.



**The BOD took sack lunches for a Montana-style break at Chico.**

The BOD met in person at the AGM in March in Montana and 8 times via conference calls. The ‘theme’ for the BOD in 2015 continued as before – giving! When the BOD decided to propose to the membership the first-ever AGM in Asia, each board member agreed to pay a third of their own airfare to Korea.



**Stuart McMillan, BOD Chair, gives Chico horses an apple treat.**

Ib Hagsten, Ph.D., BOD Chair, handed over the reins of the Chair to Stuart McMillan of Manitoba, CANADA after the 2015 AGM. Stuart is a frequent speaker on organic topics. However, Ib, as Vice-Chair continues to represent IOIA at key meetings in the organic sector and agronomic meetings. In July, he presented “Support people, the planet and increase profit through using organic soil conservation practices” to the Soil and Water Conservation Society. He also addressed the fall meeting of the NOSB. Other BOD officers are Pam (Treasurer), Garth (Secretary), Isidor (Executive-at-Large), and Margaret (Director).

## Staff:

**A huge thank-you goes from the BOD to staff for their many hours of work on the Sound and Sensible project.** Hand in hand with continued stability on the BOD, IOIA acknowledges and values the continued stability in staff which was critical in successfully completing the project in just one year. IOIA benefits from a staff of highly skilled and dedicated individuals. Using a variety of distance communications, the full-time staff works from offices 400 miles apart. Part-time staff work in part from their homes and in part from the IOIA office. This reduces the carbon footprint, improves employee productivity, and allows the staff to occupy a relatively small office space.



Margaret Scoles continues as Executive Director. She served as the inspector for the Sound and Sensible videos and led the work on the Inspection Guide and Training Materials. She was also called into service as a Peer Evaluator, additional to her regular workload and travel.

Jonda Crosby continues as Training Services Director. She spearheaded IOIA's food safety training program and was in charge of the Sound and Sensible video projects, including coordinating the Spanish translation. She has proven her worth as a grant project writer, including a key role in writing the Montana food safety and Sound and Sensible proposals.



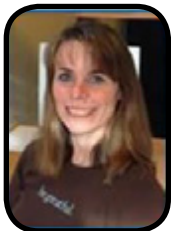
Kathy Bowers, US Training Services Coordinator, led the work on the Sound and Sensible Organic Slaughter Certification module. She demonstrated the capacity to not only work hard and cheerfully, but she rose to new levels by bringing in her video editing and photography. She managed both the webinar program and the on-site trainings in the US.

Teri Lindberg, Administrative Assistant, re-joined IOIA in 2015. She had worked previously at IOIA for four years but left in 2011. She returned to help out as support staff for the duration of the Sound and Sensible project. Fortunately for IOIA, she decided to stay.



Sacha Draine continues as International Training Manager. She manages the cosponsor-managed trainings, which include most of the trainings outside of the US and some in the US. During Nov.-Dec. 2015, Sacha managed four trainings in four countries in one month, and three of those were in Spanish. Fortunately she is fluent in five languages – a huge asset to IOIA.

Joe Whalen, Office Admin, was in charge of membership and accreditation. He also contributed significantly to the office landscaping project. He helped design and implement a system to capture and use rainwater as a resource, keep the basement dry, and provide a healthful and pleasant space for staff. IOIA bid farewell to Joe with the close of 2015.



Linda Bird, Bookkeeper, part-time bookkeeper, keeps the IOIA books in excellent shape with her past career as a Certified Public Accountant.

Diane Cooner, Newsletter Editor, Website Manager, and moderator of the IOIA Forums. She works as a contractor and provides invaluable and varied support for special projects to alleviate other staff workload.



Tony Fleming, Newsletter Technical Editor, IOIA's Technical Editor, writes, edits, or reviews articles for publication in the newsletter.



**International Organic Inspectors Association  
Balance Sheet (Cash Basis)**

**As of December 31, 2015**

<b>ASSETS</b>	Dec 31, 2015	Dec 31, 2014
<b>Current Assets</b>		
Total Checking/Savings/CDs	277,231.50	187,776.07
Accounts Receivable	-7,722.49	-6,420.74
Total Other Current Assets	13,745.50	12,318.56
<b>Total Current Assets</b>	<b>283,254.51</b>	<b>193,673.89</b>
<b>Fixed Assets</b>		
Total Building	38,768.86	38,768.86
<b>Other Assets</b>		
Accumulated Depreciation	-10,690.95	-8,636.51
	<u>                    </u>	<u>                    </u>
<b>TOTAL ASSETS</b>	<b>311,332.42</b>	<b>193,673.89</b>
<b>LIABILITIES &amp; EQUITY</b>		
<b>Equity</b>		
Contributed Property-FMValue	29,031.80	29,031.80
Reimburseables	50.00	
Restricted (Scholarship Travel Fund)	573.42	573.42
Retained Funds	194,201.02	200,219.58
Net Income	87,476.18	-6,018.56
	<u>                    </u>	<u>                    </u>
<b>Total Equity</b>	<b>311,332.42</b>	<b>223,806.24</b>
	<u>                    </u>	<u>                    </u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b><u>311,332.42</u></b>	<b><u>223,806.24</u></b>