

## Organic Fraud - Advanced Training in Texas - February

IOIA conducted its annual general meeting (AGM) in San Antonio TX last month, in conjunction with the Accredited Certifiers Association AGM and annual certifier training presented by the USDA's National Organic Program team. As in past years, the AGM was accompanied by Advanced Organic Inspector training; the topic this year was Fraud Prevention and Detection.

The sessions were well-attended by an audience of inspectors, certifier staff, and others in the regulatory space. The day was kicked off by Ken Commins' session 'Organic Fraud & Ways to Detect It'. A founder and past Executive Director of IOAS, Ken first presented this topic to an IOIA training event back in 2010. In this session, he shared a range of key observations and recommended anti-fraud strategies. Best practices discussed included tracebacks, mass balances, cross checks, yield potential to sales on farms, and supply chain audits. Robust mass balance exercises can both detect and deter fraud. As an accreditor, Ken frequently saw mass balances performed inadequately. He encouraged inspectors to not enter premises expecting to find fraud, but also not to believe that we cannot find fraud on a routine inspection.

That session was followed by 'Fraud Prevention Plans: Changes in SOE for Operators, Certifiers, and Inspectors' presented by Gwendolyn Wyard and Kim Dietz, who recently formed the new consultancy and training partnership Strengthening Organic Systems (SOS) in 2023. The

Strengthening Organic Enforcement (SOE) final rule came into full implementation on March 19, 2024; inspectors are now expected to understand and verify fraud prevention plans. Fraud Prevention Plans are a requirement within Organic System Plans.

'Fraud Prevention and the Organic Inspector' followed, presented by Silke Fuchshofen of Organic Insights. This session laid out the

highest skill of inspecting: having a cooperative attitude with the operator, while also having an eye out for fraud. "The trick is to not think 'fraud'. If there is suspicion, do not take it in, do not take it as personal betrayal. You need to get the facts, but you need to stay in a relationship with the operator for the sake of a good inspection. Once distrust takes over, it is very hard to continue the work. Also, always remember you could be wrong. Gather the evidence and let the certifier follow up with the case. Avoid getting adversarial and always remain respectful, even if there is evident fraud. You do not know who committed it,

See Texas, page 4



## Notes from the Chair by Janine Gibson

Actually, from my yoga mat!

Welcome Spring to many watersheds and welcome to our March edition! We have successfully completed a dynamic 2024 Annual General Meeting, new board slate and 2023 Annual Report, thru which we can all celebrate our many accomplishments toward our shared mission! Much gratitude and respect to our outgoing board members Beth Dominick, Kate Newkirk and Terrance Layhew for their past board work and continued committee service.

See Notes, page 4

## Welcome New Members

### New Inspectors

Victor Manuel Bautista Guitierrez,  
Guanajuato, Mexico  
Ingo Huesing, Ontario, Canada  
Chad Snader, Colorado

### Returning Inspectors

Aaron Bogart, Pennsylvania

### Inspector Emeritus

Lois Christie, California  
Matthew Rejewski, New York

### Supporting Individuals

Joni Birdsall, Nebraska  
Will Bratton, Nevada  
Jie Cao, Nova Scotia, Canada  
Robin Chanin, Georgia  
Kristopher Edin, Oregon  
Erica Garcia, California  
Kris Johnson, Iowa  
Christina Shriber, Ohio  
Jason Smith, Arkansas  
Gwilym D. Walker, California  
Alexander Wilkinson, Georgia

### Returning Supporting Individuals

Andrew Park, California

### Webinar Discount Reminder

All inspector members are entitled to take 50% off any one webinar during 2024

### IOIA BOARD OF DIRECTORS

— CHAIR —  
JANINE GIBSON  
— VICE CHAIR —  
JOSEPH WARD  
— TREASURER —  
ALLAN BENJAMIN  
— SECRETARY —  
KATHE PURVIS  
— EXECUTIVE COMMITTEE AT LARGE —  
MARGARITO CAL  
— DIRECTOR —  
JUSTIN HURLEY  
— DIRECTOR —  
RHEA EPP

The Inspectors' Report is the newsletter of International Organic Inspectors Association. IOIA is a 501 (c)(3) educational organization. Our mission is to address issues and concerns relevant to organic inspectors, to provide quality inspector training and to promote integrity and consistency in the organic certification process.  
Editor: [Diane Cooner](#)

## Webinar Training Schedule

for details & to register go to our [website](#)

### April 9 & 12 100 Level NOP Crop Standards

Webinar will prepare participants to verify compliance with the NOP Crop Standards.

9:00 a.m. - 12:00 p.m. (Pacific). Two 3 hour sessions.

Trainer: Garry Lean

[Register and Pay Here](#)

### April 16 & 19 100 Level NOP Livestock Standards

Webinar will prepare participants to verify compliance with the NOP Livestock Standards.

9:00 a.m. - 12:00 p.m. (Pacific). Two 3 hour sessions.

Trainer: Garry Lean

[Register and Pay Here](#)

### April 17 100 Level IOIA/OMRI NOP Crop Input Materials

This webinar offers an understanding of the compliance requirements of inputs used within the crop production scope through a discussion and learning session with OMRI staff.

9:00 a.m. - 11:00 a.m. (Pacific). One 2 hour session.

Trainer: Doug Currier

[Register and Pay Here](#)

### April 22 & 24 **Updated!** 200 Level Dairy Feed Audit

9:00 a.m. - 11:30 a.m. (Pacific) Two 2.5 hour sessions.

Trainer: Nate Powell-Palm

[Register and Pay Here](#)

### April 25 - May 2 200 Level Processing In/Out Balances, Traceability & Recipe Verification under NOP & COR

The webinar allows inspectors and certifiers to further their understanding of NOP and COR standards.

9:00 a.m. - 11:00 a.m. (Pacific) Two 2 hour sessions.

Trainer: Kelly A. Monaghan

[Register and Pay Here](#)

### **NEW!** May 9 (US, Canada, Latin America)/May 10 (Asia)

EU 848/2018 category A, D, E and Associated Regulations

This webinar is essential for anyone inspecting to the EU regulations. The presentation will give participants an understanding of the structure of EU regs and how to go about finding specifics. Grower groups will be addressed. The livestock production category will not be addressed specifically. **Date and time depends on your location, please see our site for details.** Special IOIA Inspector Member Discount.

Trainer: Kathe Purvis

[Register and Pay Here](#)

### May 21 & 24 100 Level NOP Crop Standards

9:00 a.m. - 12:00 p.m. (Pacific). Two 3 hour sessions.

Trainer: Nate Powell-Palm

[Register and Pay Here](#)

### May 22 100 Level IOIA/OMRI NOP Processing Input

Materials. See April 17 listing, with orientation towards processing/handling scope.

9:00 a.m. - 11:00 a.m. (Pacific). One 2 hour session.

Trainer: Doug Currier

[Register and Pay Here](#)

### June 4 & 7 100 Level NOP Processing Standards

9:00 a.m. - 12:00 p.m. (Pacific). Two 3 hour sessions.

Trainer: Garry Lean

[Register and Pay Here](#)

### June 18 & 21 100 Level NOP Livestock Standards

9:00 a.m. - 12:00 p.m. (Pacific). Two 3 hour sessions.

Trainer: Nate Powell-Palm

[Register and Pay Here](#)

## Onsite Basic Courses 2024 - [See the IOIA website for full details](#)

### Basic Crop and Livestock Training, Albany area, New York.

Basic Crop Inspection Training, April 29 - May 3.

Deadline to apply March 18

### Basic Livestock Inspection Training, May 6 - 10.

Deadline to apply March 25

### Basic Crop Inspection and Processing Inspection Training, Farmington, Minnesota. November 11-15

The training will be held at Mount Olivet Conference & Retreat Center, [www.mtolivetretreat.org](http://www.mtolivetretreat.org)

Deadline to apply September 30

### Basic Processing Inspection Training, Farmington, Minnesota. November 18-22.

The training will be held at Mount Olivet Conference & Retreat Center.

Deadline to apply September 30

## Online Basic Courses 2024 - [see the IOIA site for full details](#)

### Online Basic NOP Crop Inspection Training June 10 - 14

The 4 ½ -day Basic Organic Processing Inspection Training follows IOIA's curriculum requirements which include: instruction on the organic standards (focus on the USDA National Organic Rule).

Deadline to Register and Apply is April 29, 2024

### Online Basic NOP Processing Inspection Training. June 24 - 28

The 4 ½ -day Basic Inspection Training follows IOIA's curriculum requirements.

Deadline to Register and Apply is Friday, May 10, 2024.

### Online Basic NOP Livestock Inspection Training. July 8 - 12

The 4 ½ -day Basic Inspection Training follows IOIA's curriculum requirements.

Deadline to Register and Apply is Friday, May 24, 2024.

### Online COR - Basic Crop Inspection Training - July 15 - 19

The Basic Crop Inspection Training to COR Standards provides basic level training to develop skills required for inspecting and reporting on the management of an organic crop operations according to a specified set of standards. For courses conducted in Canada, the standard is CAN/CGSB-32.310-2020 and Permitted Substance Lists CAN/CGSB-32.311-2020.

The 4 ½ -day Basic Inspection Training follows IOIA's curriculum requirements.

Deadline to Register and Apply is Friday, May 31, 2024.



Not finding a training you are looking for or all trainings full?  
[Please register here](#) to be contacted by IOIA when that training is available.

## USDA's Organic Integrity Learning Center Expands Offerings

### New Microlearning: Climate smart agriculture

Courses in the [Organic Integrity Learning Center](#) are free and open to all.



## Notes from the Chair, from page 1

Thank you once again for your confidence in myself and your board and staff leadership team, as we strive to implement and update our IOIA Strategic Workplan.

Chuck, Al, Justine and Grace have primed the pump with some entertaining stories for our fun(d)raising collection, Inspector Tails. We thank them and encourage those of you with stories to tell of your inspector experiences to please, put pen to paper and share them with us as soon as possible! This story collection has the potential to be a great outreach tool to help folks decide if joining our ranks is for them!



As George Washington, in his time, is reported to have said "Agriculture is the most healthful, most useful and most noble employment!" I believe it can be so again. Thank you for your work supporting a more resilient, more healthful, more noble agricultural system!

## Texas, from page 1

nor what the circumstances were."

A panel on 'Grain Fraud, before and after SOE' gave presentations on major fraud cases involving grains both domestically, and in the Black Sea Region. Panelists followed with discussion of how things are expected to change with implementation of the SOE. In addition to Fraud Prevention Plans, audits of supply chains are required, and specific requirements have been added for traceback and mass balance exercises. Expectations for competencies of inspectors, reviewers, and other certification personnel are more rigorous. The elimination of excluded handlers now requires certification of virtually all entities in the supply chain, with very few exceptions. Sam Welsch, founder of OneCert Inc. joined the panel to share a US domestic perspective.

Bo van Elzakker of the Alliance for Organic Integrity followed, with a detailed analysis of Grain Fraud cases in the Black Sea region; cases that were well documented and sometimes found their way into the media spotlight. A key take-away from this showed numerous weak links along these complex supply chains, hampering the ability for any given inspector to detect impropriety when auditing individual operators. It's too early to know whether what happened 5 years ago would be detected in view of the SOE requirements, but this is the hope. It has become clear that there is a higher probability of fraudulent practices in larger operations, especially those that span international boundaries.

Anne Ross of the Cornucopia Institute wrapped up the sessions with a highly educational presentation on Human Labor Trafficking in its various forms, and how it too constitutes fraud. The ubiquitous presence of H2A migrant workers on farm operations across the US can easily mask labor trafficking issues. Although 'fairness' is one of the IFOAM principles of Organic Agriculture, it remains absent from any formal treatment in the USDA organic regulations. Poor or illegal labor conditions may go hand and hand with poor performance meeting the new SOE requirements. Unquestionably, this session raised keen awareness from the mostly US-based training participants.

*"Many in the organic sector operate under the false assumption that exposing fraud on a large scale would do irreparable damage to the organic label. To the contrary - it's calling out bad actors and exposing the truth that protects real organic farmers and consumers. Ultimately, that is protecting the organic brand."*  
- Speaker Anne Ross

Michael Sligh joined remotely to help wrap up these topics, noting concerns about the increased burden on small farm operators having to comply with new regulatory requirements.

The sessions received very positive feedback from participants. This bodes well for future training collaborations among cross-functional groups who bring expertise from diverse areas of the organic industry. Finally, appreciation is due to all our speakers, who without exception declined a speaker honorarium; donating their time to make this training event more accessible and affordable. *by Drew Gourdie, IOIA Business Development Director*

## Notes from the Executive Director by Margaret Scoles

**Texas:** Wow, does ACA know how to throw a party! In celebration of their 20<sup>th</sup> anniversary, they pulled out all the stops with the 'SOE Rodeo' training conference in San Antonio. IOIA was well represented for all events. The annual ACA reception was held on the grounds of the historic Alamo with great food and a western theme. One highlight for me personally was our own board member Janine Gibson taking over the band's mic and singing "Working Girl Blues", complete with yodeling in my honor. See her performance on our [IOIA Facebook](#) page, along with stunning photos of Texas longhorn cattle in the street during our AGM. The NOP training was Day 1, followed by the 2-day ACA conference and training - interspersed with chocolate SOE belt buckles, designer western theme cookies, and cactus cupcakes! Miles McEvoy attempted to do the impossible (and did pretty well at it). He addressed the Grower Group aspects of SOE during a lunch at the Western Art Museum, throwing in his photos of birding during his travels around the globe.



**Annual Report:** I encourage you to read the full [2023 Annual Report](#), which gives a big shout-out to IOIA's very engaged members and active committees. The 2024 AGM archive is also complete online.

**IOIA's Policy Comment Committee** is hard at work developing an IOIA statement on the "Employee or Independent Contractor Classification Under the Fair Labor Standards Act" (EICC) which was published on January 10, 2024 and went into effect March 11. (see p. 11)

**And speaking of deadlines – March 19 was implementation for SOE.** And for livestock inspectors, don't forget that we are in the implementation phase for Organic Livestock and Poultry Standards, with an effective date of Jan. 12, 2024 and compliance date of January 2, 2025. There is a longer transition period for some of the poultry requirements for operations certified prior to Jan 2, 2025.

**New Webinars:** See page 2 of this issue for more about [May 9/10, 2024: Changes to EU Regulation- 848:2018](#) with Kathe Purvis. IOIA strives to bring cutting edge topics with deep discounts for Inspector Members. On deck is an updated 200-level Dairy Feed Audit webinar. And on the near horizon – a webinar on OLPS.

**IOIA Promotion and Advocacy:** While I am shouting out – kudos to Drew Gourdie, Business Development Director, for greatly boosting IOIA's presence at industry events. He led the January activities in Guelph including an IOIA social, jumped on a plane for Texas, and within the next month, represented IOIA at Marbleseed in Wisconsin and Expo West in Anaheim. In April he is headed to Vancouver for the Canadian Health Food Association event. We will meet up in Washington DC for Organic Week in May – IOIA's first since 2019!

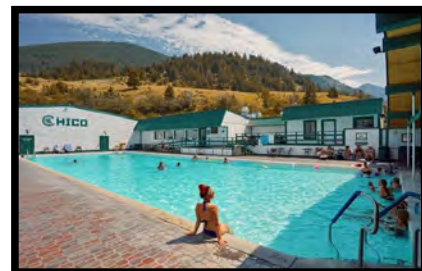
**Mentorship:** With all of the activities in 2023, IOIA sees more and more interest in structured apprenticeship opportunities. In 2024, we will continue to work with ACA to access funding, bring consistency to apprenticeship, and to ensure mentors can be compensated appropriately for their valuable time. Read one inspector's experiences on pages 12-13.

## AGM 2025 Announced!

We will be returning to Chico Hot Springs, located in Pray, Montana, about 45 minutes north of Yellowstone National Park. This was the venue for our 2015 AGM and was quite popular with members. It is a great place to bring the family and enjoy natural, very relaxing, and chemical-free hot springs, plus one of the best restaurants in the region!

Two days of Advanced Training including field trips are currently under development.

Dates: Annual Meeting on Monday, March 24, and Advanced Training March 25 -26



## Sector News

### U.S. Farm Bill Gets Funding

U.S. President Biden signed into law a \$460 billion appropriations bill with funding through Sept. 30 for the USDA and five other federal departments on March 9, providing full-year funding after four stopgap bills. House and Senate leaders have a March 22 deadline to agree on and pass a funding bill for the rest of the federal government. Fiscal years begin each Oct 1.

Under the bill, the USDA will become a member, on a case by case basis, of the Committee on Financial Investment in the United States, which determines if transactions pose a national security risk; and the Women, Infants and Children program was allotted \$7.03 billion, a \$1-billion increase from fiscal 2023 because of high food prices and rising enrollment. *Chuck Abbott, FERN's AG Insider, March 10, 2024*

### Proposed Changes to the USDA Organic Regulations: Mushroom and Pet Food Standards Now Open for Comment

March 11 - The USDA Agricultural Marketing Service (AMS) has published a proposed rule in the Federal Register to amend the USDA organic regulations. The rule proposes specific standards for organic mushroom production and organic pet food handling, creating more consistent standards for these markets. The proposed changes are based on public input and NOSB recommendations.

For organic mushrooms, this proposed rule would:

- Clarify which existing crop production standards apply to organic mushroom production.
- Create a mushroom-specific standard for organic compost production.
- Require operations producing organic mushrooms to:
  - Use organic materials for the uncomposted portions of production substrate when commercially available.
  - Use organic spawn media when commercially available.
  - Use organic mushroom spawn when commercially available.



For organic pet food, the rule would:

- Clarify how existing organic labeling requirements should be applied to organic pet food.
- Allow organic meat and slaughter by-products in organic pet food.
- Describe what ingredients can be used in organic pet food.
- Add synthetic taurine (an amino acid) to the National List and allow its use in organic pet food to meet some pets' nutritional needs.

The public comment period closes on May 10, 2024. To be part of the policymaking process and make your voice heard, click on the link below to read the proposed rule and submit a comment.

[Read and Comment on the Proposed Rule](#)

### And the winner is....

Congratulations to **Brian Baker**, who was recognized with the **Steward of Sustainable Agriculture (The Sustie Award)**: for those who have demonstrated their long term, significant contributions to the well-being of agriculture and the planet, at the recent Ecological Farming Association (EcoFarm) Conference.

Brian is one of the founders of the Organic Materials Review Institute (OMRI), former Director of Sustainability at a SUNY the first president of IFOAM NORTH AMERICA, researcher and farmer.

## Sector News

### CFS Statement on Organic Grower Group Amicus Brief

Center for Food Safety, representing itself and eight other organic stakeholders, recently filed a “friend of the court” amicus brief in support of organic “grower group” certification in a case challenging the longstanding practice, which was further codified in USDA’s 2023 organic rule revisions.

The Organic Food Production Act’s (OFPA) unambiguously supports the inclusion of grower groups, a well-established, internationally recognized, and necessary practice that is a critical element for the proliferation of organic practices globally and the inclusion of thousands of smallholder farmers in the organic marketplace. While we strongly condemn any organic fraud and call on USDA to use its authority to prevent it, individual cases of fraud should not be confused with the importance of the grower group system. In fact, USDA’s new rule gives it increased strength to address any such problems. And any prohibition on group certification would cause catastrophic consequences to all organic stakeholders: the lost livelihoods of small organic farmers around the world, the elimination of the sourcing for organic companies, and loss of these organic products like coffee, chocolate, and more for organic consumers. Accordingly, we presented these concerns to the court in support of the efficacy and legality of the grower group certification process, a system that significantly benefits organic farmers, the environment, and consumers.

Read the full amicus brief [here](#). The amici groups include organic nonprofits, companies, international certifiers, and grocers. *Center for Food safety website, March 05, 2024*

### More Organic Farms, Farmland and Food Sales in 2022

Globally, organic farmland and farms increased in 2022, with global organic farmland up 26.6% to 96 million hectares and 2% of the world’s farmland in 2022, according to The World of Organic Agriculture, published by the Research Institute of Organic Agriculture (FiBL) and IFOAM – Organics International and released at Bio-Fach.

Sales of organic food hit €135 billion in 2022, with the United States once again the top market globally (€56.6 billion), followed by Germany (€15.3 billion) and the new number 3: China (€12.4 billion). Retail sales in Canada (+9.7%) and the United States (+4.4% increased, while sales in some European countries declined. The Swiss spent the most on organic food (an average of €437 per person), and Denmark continued to have the highest share of the organic market at 12% of the total food market.

In 2022, the number of organic producers increased about 26%, to reach 4.5 million, primarily due to a significant increase in India. India also remained the country with the most organic producers in 2022 (2.5 million producers). *Wolf & Associates News Updates, February 2024*

### Watchdog Calls for Investigation of NOP

OrganicEye, an industry watchdog, has updated its request to the USDA Office of Inspector General (OIG) to investigate the National Organic Program, alleging malfeasance in its lack of preventing corporate influence peddling in the form of financial payments to certifiers over and above inspection fees and failing to enforce the agency’s regulations preventing conflicts of interest, leading to the erosion of the integrity of the organic label.

USDA regulations require nonprofits doing lobbying, advocacy work, and education to divest themselves of their certification operations so competing activities do not constitute a conflict of interest.

Read the entire press release [here](#).



## Fiji Workshop - “Introduction to certified organic auditing”

“Introduction to certified organic auditing”, a 5-day course held in Nadi, Fiji February 5-9 was the result of a year of planning and development. The training was funded by the EU as part of ‘Safe Agricultural trade Facilitation through Economic integration in the Pacific’ ([SAFE Pacific](#)) project organized by the Pacific Organic and Ethical Trade Community [[POETCom](#)], and implemented through SPC’s [Land Resources Division](#). It was cosponsored by IOIA, SPC, and POETcom (the Pacific Organic & Ethical Trade community).

Fourteen participants from the Pacific region attended. Kathe Purvis, Perth, Western Australia, was the lead trainer, assisted by Jim Pierce of POETcom. Pierce and Purvis are both members of the IOIA Asia Pacific Committee, who sparked the idea for this training.

Day 1 and Day 5 were field trip days, with the first to set the tone for participants, and the last as a practical exercise to consolidate and demonstrate learnings. The final assessment



for certificate was an audit report on the Day 5 field trip. The training addressed grower groups and included guest speakers.

This training will prepare qualified individuals to engage as “Provisional” Inspectors with organic certification bodies who will, in turn, mentor the Provisional Inspectors through their Witness and Shadow Audit requirements until they become fully qualified Lead Organic Inspectors. The training aimed to support Pacific micro-small and medium enterprises with capacity building and increased access to markets.

*“Organic certification for export markets is expensive. Establishing a regional pool of Pacific Islander Organic inspectors will bring these costs down significantly, and local Inspectors will do a better job since they are familiar with local farming practices”.* Jim Pierce, the Coordinator for POETCom

More about POETcom and The Pacific Community – from Jim:

POETCom is the peak body for the organic movement in the Pacific region. It is a membership organization of farmers’ associations, farmer support organisations, NGOs, the private sector, and research institutions working with governments across the Pacific.

Hosted by the Land Resources Division of the Pacific Community, POETCom is breaking new ground in the Organic movement with a gender-inclusive, people-centred approach. The Pacific Community has been supporting sustainable development since 1947. [www.spc.int](http://www.spc.int)





## News from Canada

### COTA 2023 Organic Summit

The Canadian Organic Trade Association (COTA) continues to play a key role in the promotion of organic food and farming in Canada. COTA held their 2023 Organic Summit in November, a blend of educational sessions presented by subject matter experts, and lobbying meetings with Canadian Members of Parliament and Department Ministers. Attendees were inspired through world-class speakers and empowered to take meaningful steps towards growth and development of the sector.

The Organic Parliamentary Reception on November 20th welcomed Parliamentarians, staff and organic industry members. The Parliament Day on November 21st provided an opportunity for the priorities of the sector to be brought directly to Members of Parliament and Senators, with organic leaders participating in numerous meetings throughout the day with these stakeholders.

The stated goal of the 2023 sessions was to establish a policy framework for organic farming in Canada integrating climate, agriculture and environment. COTA also sought to position organics as a key pillar of the Canadian Sustainable Agriculture Strategy. The Strategy framework is designed to align the various NGO's who operate in the organic and sustainable ag sectors across the country, such as COTA, Canadian Organic Growers, and Organic Federation of Canada. *Please see page 24 for an infographic on Canada Organic Facts*

### Depth of Field Film Series

Canada's National Farmers Union released a collection of short films called Depth of Field – a series of 40 short documentaries produced and presented by the National Farmers Union and March Forth Creative. The films showcase Canadian farmers and farm workers, and their sustainable farming practices both on and off the land. Rotational grazing, seed saving, building healthy soils, and working for social justice – different farmers highlight their own priorities and, together, these unscripted films tell the story of farming practices that would create the food system we all want. See the films here: <https://www.nfu.ca/filmsaboutfarming/meet-your-farmers/>

### Guelph Organic Conference

The Guelph Organic Conference (GOC), held annually in January at the University of Guelph in Ontario, Canada, serves as a key platform for the organic community to convene and discuss key issues facing the industry. This year's edition featured a diverse range of sessions, workshops, and panel discussions covering various aspects of organic agriculture including soil health, biodiverse conservation, sustainable farming practices, and market trends. The event facilitated networking opportunities for farmers, researchers, policymakers, and industry stakeholders to exchange ideas, forge partnerships, and collaborate on initiatives aimed at advancing the organic farming movement.

Key themes emphasized throughout the conference included understanding the role that regenerative agriculture has recently begun to play at the consumer level, the role of organic farming in mitigating climate change, and the need for greater support for small-scale organic farmers.

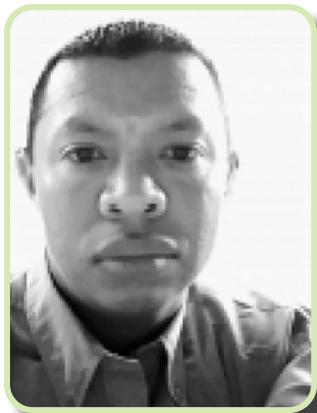
IOIA participated in all aspects of the conference including the Keynote Address and break-out learning sessions. In addition, we staffed a booth in the exhibitor section of the conference, to meet and greet new potential future inspectors. We also held our annual Inspector Social at the host venue hotel, which was graciously supported by The Centre for Systems Integration (CSI) and Pro-Cert Organic Systems – two leading certifiers who support Canada's organic farming and processing community. We acknowledge and appreciate their generous support of IOIA!



## 2023-2024 Scholarship Recipients

### Iris Rendon, Ontario, Canada

Iris has been committed to the organic industry for over a decade, and believes strongly that the principles promoted by organic agriculture and food production are essential to preserving our home, the earth. Iris is determined to support the organic movement through her career as well as by personal choices each and every day. From starting out as a food safety audit administrator, later working in quality management and regulatory roles at organic certification and accreditation bodies, to more recently working directly with organic food producers, Iris applied for the Rutherford Scholarship as she is actively pursuing training opportunities to become a qualified organic inspector. Having recently completed the COR producer inspector training, and many of the training modules available on the USDA NOP Organic Integrity Learning Center, Iris looks forward to the next step in her learning journey via the IOIA organic food processor inspector training course, and continuing to serve the organic industry for many years.



### Wilver Betanco, Somoto, Nicaragua

Wilver worked as a phytosanitary inspector for six years prior to his work in sustainable family farm agriculture and farm certification activities. He primarily works in Rural Community Development, including Climate Change and Resilient Production System (CC, Adaptation and Mitigation), with a focus on the empowerment of rural families.

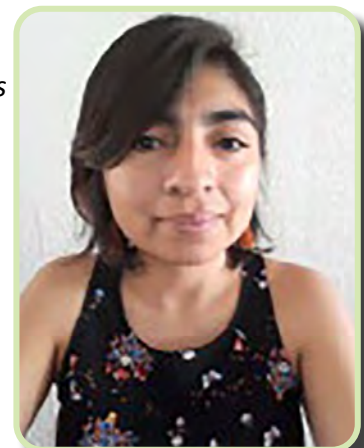
Wilver currently serves as a technical advisor for an exporter and is responsible for farm certification activities, including preparation of documentary support and advice to producers to have conditions required in different Certification Seals (UTZ, Starbucks, Rainforest Alliance), primarily with coffee farms in the territories of Segovia, Jinotega and Matagalpa in Nicaragua.

He has extensive rural development credentials, including management of community groups and field facilitator for graduate students in the National Program of Technical Education of the Countryside, and holds two Field Master's Degrees: "Quality of Organic and Conventional Coffee"; and "Evaluation of *Beauveria bassiana* in Coffee Cultivation".

### Mariana Ramirez, Oaxaca, Mexico

Mariana has served as an organic inspector since 2017. *"In this time I have learned about the great responsibility that this role of inspector carries within the third-party certification chain. I have made it my goal to work with different certification agencies in Mexico. To do this, it is clear to me that I must maintain my training according to the updates of the different standards and offer a quality inspection service."*

When she is not inspecting, she is preparing coffee, because in 2020 she opened a coffee shop in her city of origin. She likes to explain to her customers the great work that is put into the production of coffee and any food they can imagine. *"I explain the processes and try to leave them thinking that: The price of a food does not necessarily correspond with its value, because all the energy put into producing that food is more than the price."* This has led me to meet different people from different disciplines and in the future I



would like to set up a participatory organic market for products from the region."

Next scholarship Deadline is October 1

See our website for details and to apply.

[English](#)

[Español](#)

## Employee or Independent Classification Under the Fair Labor Standards Act by Rachel Cherry Myers, IOIA Policy Committee

The Fair Labor Standards Act (FLSA) was enacted in 1938 by the 75th Congress and signed into law by President Franklin D. Roosevelt on October 24. The legislation created laws governing minimum wage, the 40 hour work week, and child labor protections. This legislation was considered a milestone in the New Deal and improved the lives of millions. Congress has amended the act several times since 1938 to further improve working conditions.

The Department of Labor (DOL) is responsible for administering the act, similar to how the USDA is responsible for carrying out OFPA. On January 10, the Department of Labor published the Employee or Independent Contractor Classification Under the Fair Labor Standards Act (EICC). This was a change to the regulations that took effect on March 11, 2024.

IOIA commends the Department of Labor for an effort to improve the working conditions for Americans, especially those in low paying jobs. The changes primarily codified court precedent, as well as accounting for the rapid changes resulting from evolving technology and commerce. The publication aims to better define and clarify an economic reality test that accurately determines one's classification as employee or independent contractor. The economic reality test uses multiple factors to see if an employment relationship exists under the FLSA. The following six factors, listed below, should guide the assessment of whether a worker is an employee under the FLSA or an independent contractor in business for themselves.

- (1) opportunity for profit or loss depending on managerial skill;
- (2) investments by the worker and the potential employer;
- (3) degree of permanence of the work relationship;
- (4) nature and degree of control;
- (5) extent to which the work performed is an integral part of the potential employer's business; and
- (6) skill and initiative.



Many in the industry have been concerned over how this may impact the classification of organic inspectors. The IOIA board has asked the policy committee to look into the rule changes and prepare a comment. IOIA plans to work with a lawyer to facilitate in developing this document and hope to have something available to the community shortly.

You can read more about the new regulations here.

<https://www.federalregister.gov/documents/2024/01/10/2024-00067/employee-or-independent-contractor-classification-under-the-fair-labor-standards-act>

## Organic Inspector Ethics Committee

The Ethics Committee will be reaching out to IOIA members for their advice on how inspectors are to conduct themselves in an ethical manner. Are the Codes of Ethics and Conduct still relevant? Do they need to be updated? What should IOIA do in cases where members are reported to be unethical or misconduct themselves? The Ethics Committee plans to circulate a proposed set of revisions to the Codes of Ethics and Conduct, along with proposed changes to our policies and procedures to deal with allegations of ethics breaches and misconduct in the next few months. IOIA invites feedback from its members and intends to send out a survey that asks specific questions to guide the revision process. The goal is to have updated codes, policies, and procedures in place by the next annual general membership meeting. Your participation is important!



## The Mentorship Process – Two Approaches

Guest article by Tanya Bagley

After having the opportunity to work in inspections for more than a year at this point, I've had a chance to reflect on my experience with the training and mentoring process that got me here. My path has been an unconventional one. After many years working in the tech industry I had a desire to get out of the chair and return to the realm of growing living things, which was my first love.

Feel free to laugh, at this point, if you're in the inspections industry! I'm glad that no one discouraged me with the list of all the things I would need to learn, memorize, understand, experience, analyze, apply, and write about. But, I found that through a measured approach and finding the right help that it has been possible and most days I feel it has been terrifically successful.

### The Mentorship Process – two approaches

After my IOIA training in crops was complete I found it difficult to get an entry point into the industry. I applied to many certifiers, tried contacting local (and some not so local to me) inspectors to see if they would provide mentorship, and asked organic producers to point me to a path to inspecting. Since contact in the industry is typically the entry point, I did not have success in my efforts for a year. Having kept my eye on the IOIA website as a means of finding contacts or additional training, I saw an announcement for the IOIA Organic Crop Inspection Training and Crop Apprenticeship Intensive in Frankfort, Kentucky. It was a lucky minute because attendance at that event gave me real-world exposure to inspecting, much ongoing training, a chance to practice skills, strategies for breaking into the industry and much-needed encouragement to continue.

### Group Mentorship

The approach of the mentoring experience in Kentucky was a group one. My fellow apprentices were a diverse group of bright and motivated people who brought a variety of skills with them that they readily shared. The mentorship was a combination of lecture/inspection strategy sessions and group inspections on actual organic operations in the region. We observed inspections conducted by knowledgeable industry inspectors, Andrew Black and Garth Kahl, and managed by Angela Wartes-Kahl, all from the Organic Integrity Cooperative Guild. We wrote mock inspection reports and they were reviewed by our mentors. This experience was followed by several inspections conducted by us, and observed by our mentors. Each member of the group volunteered to conduct a portion of the inspection at the participating operation and we collaborated on a de-brief post-inspection. We then wrote our own inspection reports within a few days of conducting the inspections. These reports were also reviewed by our mentors, and feedback was given. As part of the mentorship we participated in discussion sessions about the life of an inspector, viewed videos from various certifiers, learned the business aspects of contract inspections and made some lasting valuable contacts in the inspections industry. This project was made possible to us with funding from the USDA Agricultural Marketing Service National Organic Program and supported by IOIA. The program provided one year of remote meetings where we met weekly to conduct on-going training and were able to ask questions and receive industry support. Angela was the person that notified me that there was an appropriate job opening that I might apply for. As a direct result of being involved in this experience I was prepared to apply and ultimately be hired for my current staff inspector role at Oregon Tilth. My gratitude for this experience cannot be overstated!

#### Advantages:

- The group approach provides a feeling of industry belonging, comradery among inspectors, lower-stakes chances to gain confidence and beneficial group sharing of strategies and experiences.
- An entry-level introduction to the industry/business side of organic inspections.
- Assured year of on-going learning and support.
- Independent perspectives on the organic industry.

### One-on-one Mentorship

After being hired as an inspector, qualified to inspect in the NOP Crops scope, my employer expressed a desire that I also become qualified to inspect in the NOP Livestock scope. I readily agreed and it's my hope to continue learning and growing in my role. My training consisted of the IOIA Basic Livestock Webinar and a review of courses from the Organic Integrity Learning Center in addition to training resources provided by Oregon Tilth (OTCO). I was assigned to my mentor, Senior Inspector, Matthew Molyneux from OTCO and we had several remote meetings in preparation for my mentorship.

## The Mentorship Process - Two Approaches

### Continued from page 12

The mentorship was also supported by funding from the USDA NOP via the ACA/IOIA Mentorship Cohort for Organic Inspectors. This allowed Matthew to be compensated for his work as a mentor, provided support for me as an apprentice, and gave us incentive to complete the process. Inspections Supervisor, Robert Albee and Inspections Manager, Kurt Belser of OTCO were instrumental in overseeing readiness and managing many logistical aspects to make the mentorship happen.

The one-one-one mentorship focused on current OTCO clients and the real-world realities at each operation. I have learned that since every operation is different, the ability to apply learning in varied situations is a staple in an inspector's toolkit. For my mentorship, Matthew traveled from his location in Oregon to my region in Northern Utah. OTCO worked with operations in obtaining permission to allow the mentorship inspections to also fulfill the annual mandatory inspection requirement. Matthew conducted the first two inspections and I shadowed. A crucial step taken during this mentorship was a day spent on de-briefing with Matthew. We went over the shadowed inspections and he respectfully answered questions. His approach gave me much-needed confidence going into the inspection I would conduct as lead inspector. This mentorship also gave me guidance on policies specific to OTCO and provided me with avenues to reach out for further guidance in our organization after the mentorship. I wrote mock-reports first and received detailed feedback from Matthew after their submission. Additionally, I wrote the report as the lead inspector and received helpful feedback. As I have continued to conduct further livestock inspections for OTCO, Matthew has answered my questions with clear information, and with helpful examples from his varied and recent experiences as a seasoned livestock inspector. He continues to field questions from me, which is a proven way to solidify a knowledgebase. As part of an organization, this mentorship feels essential to my further development as an inspector. Many, many thanks to OTCO and Matthew for this growth experience!



Matthew Molyneux, mentor, and Tanya Bagley, apprentice

#### Advantages:

- The mentoring was completely tailored to my individual strengths and weaknesses allowing me targeted growth.
- The learning was appropriate to the needs of my organization and my future job requirements.
- The one-on-one mentorship gave me an ongoing source of learning and support where I need it most.
- Strategies employed by my mentor increased my confidence in a short amount of time.

#### My mentorship takeaways:

1. Mentorship is essential to addressing needs in training and retaining inspectors needed in the organic industry.
2. Mentoring supports people capable and willing to work in the industry that don't have an immediate avenue to participate.
3. Several approaches to mentoring are valid and the process will benefit from exploring creative solutions to the challenge of training inspectors.
4. The industry has many knowledgeable, capable, and willing mentors when support and funding are provided for the effort.

Again, my profound thanks to those mentioned above and any who are engaged in the mentorship effort. My hope is to see it become better and better!

## Self-Paced Learning Courses

**Canadian Organic Regime - COR Series** Courses 1 & 2 each take approximately 3 hours to complete.

Inspector members price: US\$150 each.

**#1 Our Organic Certification System - The Regulation**

**#2 COR Crop Production Standards**

**#3 COR Livestock Production Standards** Note: This is a 10-12 hour course, Member Price US\$275

**Remote Inspection Training** Free to inspector members; All others \$200.

[Available in English](#) [Tambien disponible en español.](#)

**200 level IOIA/American Grassfed Association Grassfed Dairy**

Member cost \$325 - \$375 all others.



## Advanced Training Group - Texas



## Scenes from San Antonio





## Basic Live Online Training

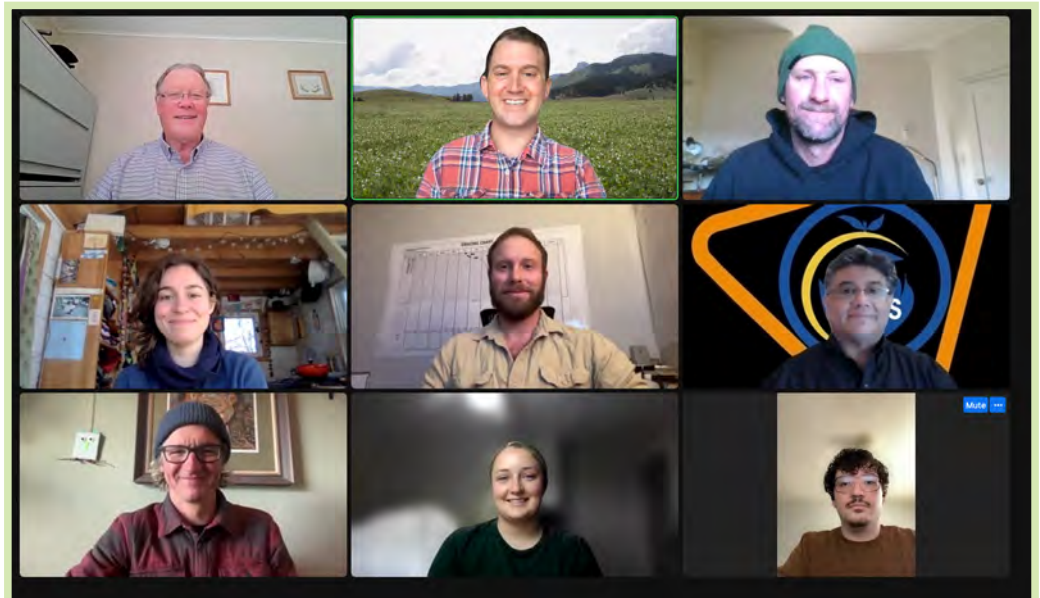


Online Basic NOP  
Processing Training,  
December 16, 2023

Trainers Garry Lean and  
Nate Powell-Palm, top left.

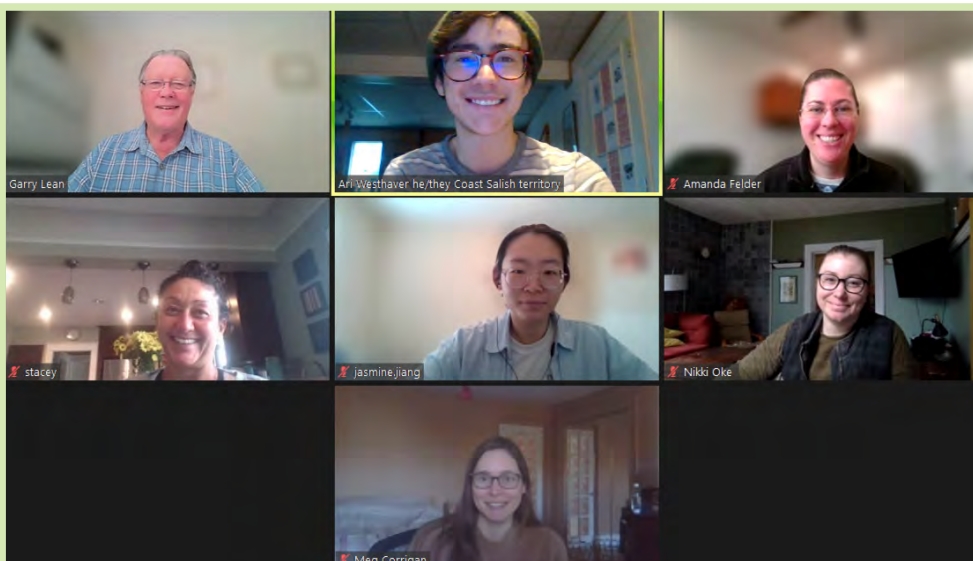
## Online Basic NOP Crop Inspection Training, February 19 - 24, 2024

Trainers Nate Powell-Palm  
and Garry Lean, top left.



## Basic Online Canada Organic Regime Processing Inspection Training, February 26 - March 4, 2024

Trainer Garry Lean, top left.



## Annual Report 2023 - Overview

*You can view the entire 2023 Annual Report on our website.*

IOIA's Strategic Plan was finalized early in 2022. Both objectives and strategic activities have been reviewed annually. We celebrate the progress made in all 3 objectives. Two areas not highlighted in the Plan but since identified are (1) Credentialing for Organic Professionals and (2) Fundraising.

**Objective 1:** Design IOIA training products to evolve with the sector, expand capacity, and grow skills for organic inspectors and other stakeholders

**Objective 2:** Advocate for the inspector profession to the organic sector, while engaging stakeholders, to increase membership benefits and grow the community

**Objective 3:** Implement a clear and structured operations protocol that holds IOIA accountable for continuous improvement within the organization, and advances the IOIA mission

We designated 2023 as the Year of the IOIA Committees.

Look for the icon below in our Annual Report that highlights projects that were fulfilled by diligent efforts of the respective committees.

2023 - Year of the IOIA Committees





## MEMBERSHIP/NOMINATIONS



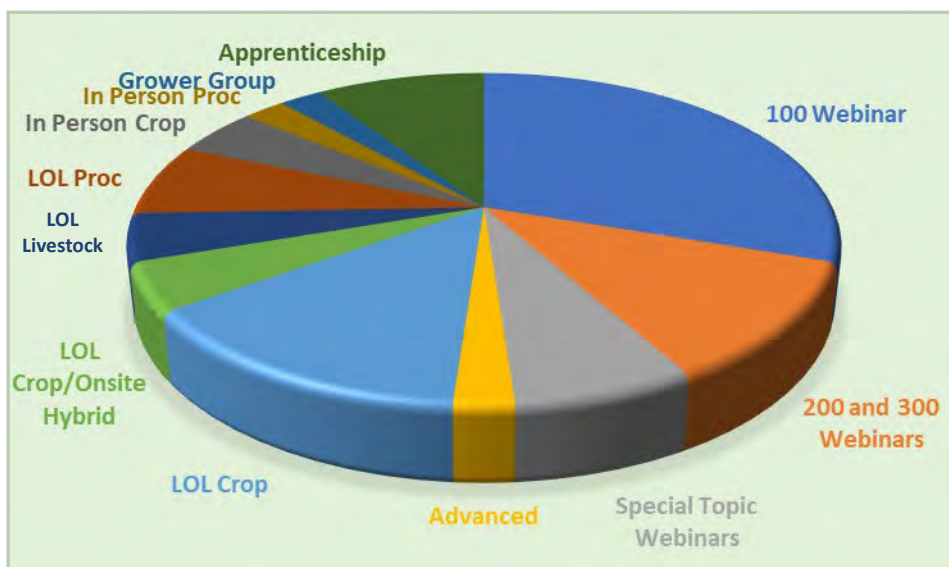
- Updated Membership Strategy with new categories of supporting members
- Simplified the process of joining for supporting members
- New Builder category (\$1000/yr)
- Modest dues increase (first in 7 years for inspectors) was well-received
- New discounted rate for Asia-Pacific inspectors



## Annual Report 2023 - Overview

### Providing quality inspector training - the core of our Mission

#### Number and Types of Training Events in 2023



### Onsite Processing Training Returns!

IOIA and Washington State Department of Agriculture (WSDA) cosponsored basic processing inspection training in Mt. Vernon, WA. WSDA arranged field trips and supported the training with staff onsite. This was the first onsite in-person processing training in four years.

### Apprenticeship Training

In 2023, IOIA offered a record number of apprenticeship opportunities. Consistent access to affordable apprenticeship opportunities continues to be an unmet need. IOIA and ACA, working together with USDA NOP funding, are exploring options for funding to ensure that quality apprenticeship is available and mentors are appropriately compensated.

### Expanding the IOIA/OMRI Training Partnership

Building on the 200-level webinar series to NOP and COR, a new NOP-based 100-level webinar series was successfully launched. The 100-level webinars grew out of training conversations with NASAA Certified Organic late in 2022. In 2023, Crop Inputs and Processing Inputs webinars were successfully offered and well-attended. These webinars help better prepare entry-level inspectors. Encouraged by the success of the series, IOIA will offer more webinars, with plans also to add 100-level Livestock Inputs and COR courses.

IOIA and ACA collaborated on a Mentorship Cohort for Organic Inspectors, serving 16 apprentices with 8 mentors. Organic Valley's Farmers Advocating for Organic (FAFO) grant program funded IOIA's first-ever industry funded apprenticeship intensive.

### New Canadian livestock inspection course

IOIA successfully developed the third of the basic scope trainings to the COR - live online Livestock Inspection Training. The course includes an inspection video with IOIA board member/Trainer Janine Gibson, filmed with the cooperation of Sardius Holsteins in Manitoba and Interlace Media. Lisa Pierce of British Columbia prepared a robust self-paced course in COR Livestock Standards to add to those previously developed for IOIA for the COR regulation and Crop Standards. This course is a prerequisite for the IOIA COR Basic Livestock Training. We are excited to have basic livestock training return to Canada and all 3 scopes of basic inspection training offered. The live online format works well for Canada, where a smaller number of participants are spread out over many kilometers.



## Annual Report 2023 - Overview

### Membership Benefits

#### Building Community

2023 saw us reaffirm our commitment to be well engaged with our members, through our outbound communications, quarterly newsletter, and both formal and informal meet-ups. We continue to offer regular online gatherings such as our monthly 'Coffee with IOIA' series, and our Town Hall sessions. As always, members are welcome to join us in person for our annual general meeting (AGM).

#### Career Advancement

Our core stock-in-trade continues to be our basic / intermediate / advanced level inspector training. We focus on a broad selection of regulatory knowledge and inspection skill courses. We'll offer updated courses in 2024 to support the industry's transition to the new SOE regulations under the USDA's NOP program.

#### Knowledge Sharing

Our quarterly newsletter 'The Inspectors' Report' continues to be a popular IOIA membership benefit. The Report includes important updates from our Executive Director) and the Chair of our Board of Directors. It also includes training schedules and regulatory news, upcoming industry events, and technical articles contributed by guest writers - topics that matter to inspectors.

#### Range of Membership Benefits:

- **Training:** Discounts on IOIA virtual and in-person training courses.
- **Town Hall Events:** Recently, "A Conversation about Hydroponics" was very well attended.
- **Online Forum:** The IOIA Forum is a valuable resource for inspectors to share knowledge, ideas, and questions regarding our chosen field. This was a very active meeting place in 2023!
- **Podcasts:** IOIA produces podcasts on timely industry topics such as "The Farm Bill Demystified".
- **Professional Credentialing:** We continue to offer an IOIA Inspector Accreditation program, to ensure that training and expertise are acknowledged within the industry.
- **New Benefit!** The internationally-renowned Alliance for Organic Integrity produces a bi-monthly publication, *The Organic Standard*. Available to IOIA members at a deep discount.
- IOIA's Peer Field Evaluation program

### Accreditation



IOIA's founding board saw the importance of inspector credentialing 30 years ago, and consequently created the IOIA Accreditation Program in 1995. At the 2023 Annual Meeting, there was considerable IOIA member discussion and excitement around credentialing, sparked by the new SOE Rule, which sets minimum numeric hours of continuing education for inspectors and other certification personnel. IOIA's Accreditation Program provides credentialing in 3 scopes (Crop, Livestock, Processing). Participation is voluntary. In 2023, IOIA's Accreditation Review Panel reviewed applications for new accreditation or renewals. Renewal is every 3 years.

### Organic Professionals Qualifications Database Working Group

The SOE sparked the formation of a working group - first the Inspector Credentialing Working Group, later renamed the Organic Professionals Qualifications Database Working Group. IOIA enlisted the leadership of Silke Fuchshofen as a facilitator. The group welcomed broad member engagement and included the Alliance for Organic Integrity and the Accredited Certifiers Association. Project outcomes are uncertain at this time, but good groundwork has been done toward a searchable database of qualifications, including inspection complexity and specialties.

## Annual Review 2023 - Overview

### CANADA



IOIA saw significant growth in interest in IOIA training, with all 3 scopes offered in 2023. Community-building activities included the Guelph Organic Conference social event in January and an inspector social at Organic BC Conference in November. IOIA has sponsored the Guelph conference since 2008.

Kelly Monaghan was named again to represent IOIA on the Technical Committee on Organic Agriculture.

IOIA participated in Organic Week in Canada, a robust week of in-person and virtual events from coast-to-coast, organized by Canada's Organic Trade Association (COTA) culminating in the Canadian Health Food Association's eastern conference, CHFA Now. The COTA team did a great job organizing and promoting all the Organic Week activities.

### ASIA PACIFIC (APC)



The APC delivered a second free promotional webinar, on residue testing in organic inspection, with 130 participants!! Kathe Purvis and Vitoon Panyakul submitted an article to *The Organic Standard* on the same topic. A list of potential trainings was developed and posted online. Live Online Grower Group training was scheduled for early 2024. The APC worked with the IOIA International training office to develop training in Fiji. Kathe participated in a South Korea training on behalf of IOIA. The APC now has members represented from 7 countries.

### LATIN AMERICA



#### Spanish language training - Crop & Processing

IOIA collaborated with EcoLOGICA in Costa Rica and AgriVita to deliver Spanish training. Spanish language Processing Training had not been delivered for several years. We graciously acknowledge IOIA Trainer Luis Brenes for his work to make this possible. A new Spanish language video training resource was developed for the processing course. The Spanish trainings accommodated three scholarship recipients, including one who had waited for years for the opportunity to take a processing course. A meeting between board liaison Margarito Cal and Latin America Committee Chair Philippe Descamps was the impetus that made this happen.

### POLICY COMMENT



IOIA's Policy Comment Committee gathers input, formulates comments, and decides when to comment and whether to survey members. They submitted comprehensive comments to US NOSB's proposals and discussion documents, (i.e., "Oversight Improvements to Deter Fraud: Consistent Location Identification"), and commented to NOP on Inerts in Organic Production. IOIA participated in the NOSB meeting in Rhode Island and the Northeast TOPP meeting.

### ETHICS



The Committee oversees and reviews the IOIA Codes of Ethics and Conduct, maintains the IOIA Ethics Complaint Process, and handles ethics complaints against IOIA members. In 2023, IOIA invested in renewing this committee. The Committee now has 10 members. Thank you to Brian Baker who facilitated the reorganization of this committee, and who now serves on the Ethics Committee. Members are current or past Board members, or members of the Accreditation Committee. The Committee is currently reviewing the IOIA Codes of Ethics and Conduct and the complaint procedures.

See **Ethics** article, page 11

## Annual Report 2023 - Overview

### MISSION-DRIVEN PROJECTS

In keeping with our mandate to support organic inspectors, IOIA undertook several strategic mission-driven projects:

- **Provide Quality Inspector Training**  
*Industry Funded Organic Livestock Apprenticeship Intensive*
- **Promoting Integrity and Consistency in the Organic Certification Process**  
*Advancing racial equity in organic*
- **Addressing issues and concerns of organic inspectors**  
*ACA/IOIA Mentors for Organic Inspectors*
- **Promoting Integrity and Consistency in the Organic Certification Process**  
*Transition Training for Producers with NCAT*

See the complete Annual Report 2023 on our website.



Nate Powell-Palm, inspector member and trainer, with Margaret Scoles, Executive Director, at The Leadership Center, Aurora, Nebraska at NCAT workshop. IOIA held one of its founding organizational meetings at this same location in 1991 and our first annual meeting in 1992.

## CELEBRATING 30 YEARS PLUS OF IOIA

### THE ORGANIC PARADE!

Our AGM and training in New Orleans

We started the year with a New Orleans brass band and a parade (a local tradition) to celebrate IOIA's 30th anniversary; IFOAM Organics International's 50th anniversary, and ACA's coming 20th anniversary. We were so happy to be together in person for these events for the first time in 3 years!



Our afternoon keynote was film maker/photographer Nathan Slabaugh with "Telling Our Story". He spoke about all he learned while making the video "Become an Organic Inspector," and then presented "IOIA 30 years - a Brief Oral History" based on video interviews with IOIA founders including Jim Riddle, Monique Scholz, and Margaret Scoles.



## Annual Report 2023 - Overview

### 2023 – a year of building capacity and investing in IOIA

IOIA's negative bottom line reflects a planned investment in IOIA's future that was implemented one year later. In 2022, IOIA planned for a \$50,000+ negative bottom line, mostly due to the addition of a significant new management position. Based on the Board's Strategic Plan, a staffing plan was completed in 2022 and new positions were identified. Meanwhile, with the delay in filling new positions, the bottom line in 2023 was about \$80,000 more positive when compared to the projected budget. One of the positions created was a Business Development Director to increase both capacity and fund development. Three positions were advertised in January 2023, with the first filled in February to fill the recently vacant position of Webinars Coordinator. Next was the Business Development Director, filled in mid-June 2023. As anticipated, this investment has resulted both in an expected temporary drop in net revenue and increased capacity for 2023. The board has projected a balanced budget for 2024.

IOIA maintains a cash reserve in bank accounts and Certificates of Deposit. Annually, the Finance Committee determines whether the recommended cash reserve should be increased. The amount stayed the same in 2024, and at no time was it necessary to dip into those reserves.

#### International Organic Inspectors Association Balance Sheet (Cash Basis) As of December 31, 2023

ASSETS	Dec. 31, 2023	Dec 31, 2022
<b>Current Assets</b>		
Total Checking/Savings/CDs	338,876.11	384,551.32
Accounts Receivable	-129.08	249.41
Total Other Current Assets	27,245.75	24,089.10
<b>Total Current Assets</b>	<b>365,992.78</b>	<b>408,889.83</b>
<b>Fixed Assets</b>		
Total Building	38,768.86	38,768.86
<b>Other Assets</b>		
Accumulated Depreciation	-22,225.45	-21,541.65
<b>TOTAL ASSETS</b>	<b>\$382,536.19</b>	<b>\$426,117.04</b>
<b>LIABILITIES &amp; EQUITY</b>		
<b>Equity</b>		
Contributed Property-FMValue	29,031.80	29,031.80
Restricted (Scholarship Funds)	21,129.37	17,337.83
Retained Funds	410,126.40	407,667.91
Net Income	-77,751.38	-27,920.50
<b>Total Equity</b>	<b>382,536.19</b>	<b>426,117.04</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>\$382,536.19</b>	<b>\$426,117.04</b>

#### FINANCE/FUNDRAISING



Allan Benjamin has served for 3 years as IOIA's Treasurer. Margarito Cal works with him as Board Liaison, and potentially as a future Treasurer.

As Treasurer, Allan chairs the Finance Committee, made of past Board Treasurers. Special thanks to these diligent and dedicated members - Brian Magaro, Pam Sullivan, and Eric Feutz.

*“A great organization is one that delivers superior performance and makes a distinctive impact over a long period of time. For a business, financial returns are a perfectly legitimate measure of performance. For a social sector organization, however, performance must be assessed relative to mission, not financial returns. In the social sectors, the critical question is not ‘How much money do we make per dollar of invested capital?’ but ‘How effectively do we deliver on our mission and make a distinctive impact, relative to our resources?’” ~ Good to Great and the Social Sectors, by Jim Collins.*

## Board of Directors Minutes Highlights - late 2023 and early 2024

*(full minutes available to inspector members on the IOIA website)*

Board members: Beth Dominick, Chair; Janine Gibson, Vice Chair Allan Benjamin, Treasurer; Kate Newkirk, Secretary; Terrance Layhew, Director; Margarito Cal, Director; Kathe Purvis - Executive Committee at large.

**November 16, 2023, by Zoom Attendance:** All Board members present. Others, Margaret Scoles, Drew Gourdie.

**IOIA Credentialing WG, Budget, Outcomes, Work Plan, OPQD Discussion.**

**Financial Review and IOIA Audit Policy:** The BOD is charged with periodic financial review of IOIA, Allan did financial review at the IOIA office, including visits to IOIA's external accounting firm and the Broadus bank, in 2022 (informal). At least annually, BoD needs to decide if/what is to be audited. Motion to investigate parameters for independent 3rd party audit and get 3 quotes accepted.

**Strategic Plan Review** with Report back on each Objective by subcommittees. Identified activities needing focus in 2024.

**December 20, 2023 by Zoom 6 p.m. Eastern**

**Attendance:** All board members present. Others: Margaret Scoles, Executive Director: Drew Gourdie; Business Development Director, for budget discussion.

**2024 AGM Agenda & BOD Election:** Confirmed vacancies and BOD candidates for BOD election.

**Credentialing - Feasibility Study funding:** E-learning course potentially co-developed with the Alliance for Organic Integrity, applicable worldwide. Proposal developed, need \$25,000 for feasibility study.

**2024 Preliminary Budget approved.**

**OFA Internship Application:** Potential for another IOIA intern.

**ED Evaluation:** Beth reported the outcomes of the ED Evaluation and the goals set for coming year. Janine motion to accept Kate's summary report from Margaret's evaluation.

**January 18, 2024 by Zoom**

**Attendance:** All Board members present. Others: Margaret Scoles, Executive Director, Drew Gourdie, Business Development Director, Beth Dominick (outgoing chair)

**2024 Annual Meeting, Budget, and 2023 Annual Report.** Approved end of year 2023 financial reports. Finalized details for the 2024 Annual Meeting, plans for new board member onboarding, and the 2023 Annual Report presentation for the annual meeting. - Projected 2024 budget with net income of \$7000 to include a budget for increased legal fees due to upcoming Fair Labor Standards Act (gig worker) rule change.

**Ethics Committee:** There are 10 Volunteers. Terms were staggered over 2 years. All 10 were approved.

**ED Report:** Issues with Gig workers from Dept of Labor, new Fair Labor Standards law with clarified definition of employee and independent contractors, may need a determination letter from 3rd party. Effective 3/19/24. Motion to meet with Policy Committee to determine with specific questions to send to lawyer, and work with ACA also.

**IOIA Board Meeting February 3<sup>rd</sup>, 2024 2-5:30 p.m. in San Antonio, Texas**

**Attendance:** All board members present, plus Beth Dominick, outgoing Chair. Welcome to new board members: Joe Ward, Justin Hurley, Rhea Epp (on Zoom). Allan Benjamin continues a second term. Others: Margaret Scoles, Drew Gourdie

**Approved Agenda** – reorganization meeting following board elections and annual meeting.

## Board Minutes - Highlights

**Officers, roles:** Janine, Chair; Joe, Vice-Chair; Allan, Treasurer; Kathe, Secretary; Margarito, Executive Committee at Large; Rhea, Director; Justin, Director. One director takes a 1-year term to fill out vacancy by early resignation of Kate Newkirk.

**Meeting Schedule:** Confirmed to retain current schedule of third Thursday, 6 p.m. Eastern time. Will continue to meet with ACA board jointly same day at 1 p.m. Eastern. Chair, vice & ED meet before board meeting to prepare, usually Monday of the week before the board meeting.

**2025 AGM Planning:** Discussion on locations and preferred dates. BOD agreed that it was preferable to return to the system of planning three years ahead, support for having more lead time and exploring international options for two to three years in the future. Come to 2025 AGM with fleshed out proposals for 3 locations. Noting the 2023 AGM Membership survey as guidance. Board also collected input from members at AGM. Investigate going to Chico Hot Springs or ACA Richmond event in 2025. 202. Chico would need to be in March rather than Feb. 2026 consider international options (i.e. Australia, Guelph). The BOD confirmed that IOIA will have a presence at ACA 2025 and Guelph. Bylaws committee to investigate options for voting online. Next meeting - how to engage and support international members.



Board Members, left to right: Kathe, Justin, Janine, Joe, Margarito, and Allan.

**OPQD:** The BOD needs time to determine practicalities – management, type of platform, costs, revenue estimates. Objective of the project - digital tool to offer members that is tracking training, offering rewards, as a service to organic industry professionals. Silke attended and presented. The BOD thanks Silke as consultant getting to the project to this point. Chair to send a follow up email to Silke to express thanks and request a summary of achievements to date and precis where we are at. BOD to review draft business proposal, presentation and next steps provided by Silke.

**IOIA Transition plan:** MS to review and update the Emergency Plan; MS to provide Work Plan Overview for Feb meeting; and provide a proposal for management training/ Transition Plan.

Encouraging words from Beth. She continues with our committee work.

### Feb 15, 2024 by Zoom

**Attendance:** All Board members present. Others: Margaret Scoles, Executive Director, Drew Gourdie, Business Development Director.

**2025 Annual Meeting -Revisit and Confirm Strategy:** Chico Hot Springs (CHS) are available for AGM Mon-Wed start and end of March 2025. Two days of advanced training, a robust agenda and invite the world. Margarito – we need to build a good training tailored to what is needed for audits in 2024 onwards – complex audits training & relevant key-note speaker. Motion to hold advanced training and AGM 2025 at CHS approved.

**2024 Workplan:** Margaret shared and explained the IOIA 2024 Events calendar. Noting ongoing training events, numerous special projects underway and conference attendance.

**Promotion Budget, OTA Policy Week:** Confirming the need to return to presence at OTA Policy week event, no attendance since 2019. Events on workplan included in promotion budget approved in IOIA 2024 budget. Attendance at events later in the year will depend on budget balance at the time.

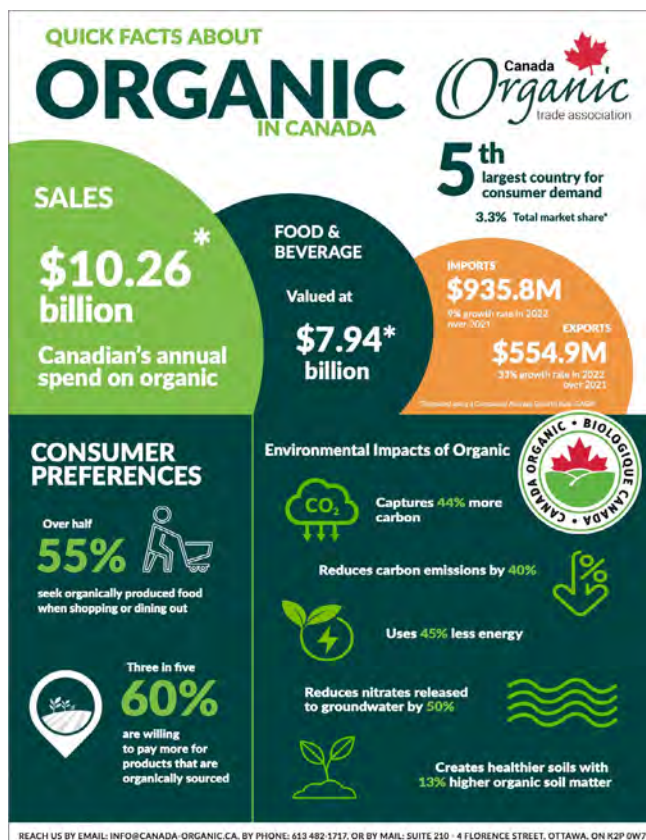
**BOD Liaison Assignments:** BOD liaisons confirmed (see IOIA website Committee list)

**Diversity, Equity and Inclusion (DEI) Cohort Advancing Racial Equity in Organics:** need to finalize who will represent IOIA in our cohort. Attendance is 3 hours per month (not July) to December, plus homework.





IOIA  
PO Box 6  
BROADUS, MT 59317 USA  
WWW.IOIA.NET  
IOIA@IOIA.NET  
406 - 436-2031



*KEEP IOIA STRONG – LEND YOUR STRENGTH AND GET INVOLVED!*

## 2024 Calendar

**April 2 - 4** [CHFA Now - Vancouver 2024](#)

**April 29 - May 1** [NOSB Spring Meeting](#), Milwaukee, Wisconsin

**May 14 - 16** The Organic Trade Association's Organic Week in Washington, D.C. [More Info and to Register](#)

Join us for 72-hours in the nation's capital to work on solutions for the complex issues surrounding organic food and farming. We will focus on continuous improvement in organic, celebrate organic leaders, and work together to advance organic policy priorities.

**December 2 - 4** 21st IFOAM Organic World Congress (OWC) in Taiwan.

**December 5 - 6** 24th General Assembly. Stay tuned for more news on ticket availability, pre-conference sessions, the congress program, speakers, and the General Assembly.

*PLEASE SEE PAGES 2 & 3 FOR THE CURRENT LIST OF  
IOIA LIVE ONLINE, ONSITE, WEBINAR AND SELF-PACED TRAINING OPPORTUNITIES*