



CREATING THE FARM & LIFE YOU WANT WITH HOLISTIC MANAGEMENT



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How to create the life and farm you want

- ✉ How to make sure you are considering what you value most deeply
- ✉ How to improve your decision making so it moves you toward what you desire for your farm / in your life



Discussion:

Handout - Pollywog Farm Decision Case



What drives the
decisions you make?

How do people commonly make decisions?

✉ Decisions are made towards a singular **objective or goal**.

✉ They are based on one or more of the following factors:

- advice, research, expert opinion, tradition, gut instinct, etc.

How many decisions do you make
from when you get up in the
morning to going to bed at
night?

Would improving your decision making
impact the quality of your life?



HOLISTIC MANAGEMENT - A MANAGEMENT & DECISION-MAKING PROCESS



A process that **simultaneously** considers the financial, environmental, and social impacts of decisions prior to implementation.

Managing holistically, using this different decision making process, can have the following impacts:

- ✉ Increased financial value with purchases
- ✉ Improved environmental impacts
- ✉ Positive social impacts
- ✉ Improved quality of life

Managing holistically can improve your ability to:

- ✉ Avoid expending resources on “symptoms” of problems instead of addressing root causes.
- ✉ Screen advice and recommendations from others, reflect your own values and your desired quality of life.
- ✉ Monitor decisions to ensure that you are on the right track.

Holistic Management

Based on different world view:

Everything is
inter-connected!

Managing holistically - What does it look like?

- 1 - Determine who the decision makers are & what resources, including money, are available
- 2 - Create a Holistic (Farm &/or Family) Goal that represents shared values
- 3 - Test decisions towards the Holistic Goal
- 4 - Monitor progress towards the Holistic Goal and take corrective action as needed

Holistic Decision Making Framework *Compared to* Conventional Decision Making Framework

Conventional

Objectives, Goals

Tools: human creativity, money &
labor, technology...

Advice, research, expert opinion...

Holistic

Decision Makers, Resources

Holistic Goal

Ecosystem Functioning

Objectives, Goals,

Tools: human creativity, money &
labor, technology...

Advice, research, expert opinion...

Seven Testing Questions

Monitor to stay on course

Holistic Management

Begins with defining what you are managing, in terms of:



The "J" Family - Example

✉ Decision Makers

- John, Jane, son Jeff, daughter Jerri

✉ Resource Base

- Parents, Relatives
- Friends, Neighbors, Community
- Clubs, Professional Organizations, Therapist (Julie)
- Land, House, Shed, Garden
- Cars, Lawn Tractor & Implements, Boat

✉ Money

- Income
- Savings Account
- Checking Account
- Investments

Discussion:

key points about WUM - Why?:

- Identifies who the Decision Makers are (kids?)
- Defines boundaries of what decision makers control and cannot control with their management
- Makes sure the right people are at the table to define the Holistic (farm &/or family) Goal
- Identifies resources available to management
- Identified resources to help solve problems, which is why it is so important to have these written down, as during times of stress, one is not always thinking clearly.
- Helps to have resources listed if farmers are thinking of adding new enterprises or making changes to their farms.



Discussion:

Handout - Pollywog Farm - Whole Under Management

Handout - Developing your own Whole Under Management

Holistic Goal

The Holistic Goal is the heart of the Holistic Management decision making process. It is used to guide all decisions and therefore actions.

Decisions are made based on:

What you
value most
deeply

Holistic Goal

First, decision makers define the quality of life they desire. This is an expression of the wishes and aspirations of all the decision makers - it is a reflection of their shared values.

Next, describe what must be produced or created to achieve the quality of life described. The key to this step is to define what must be produced not how it will be produced. (How you do things are actions, and actions are tested to see if they will move you in the direction you wish.) This account of what must be produced is called Forms of Production.

Third, describe what the land and surrounding community must be like in the future to sustain the life you describe. You must also describe how you must be perceived by others to sustain their desired quality of life into the future. This portrayal of the future is called Future Resource Base.

Holistic Goal

Your Holistic Goal:

- ✉ Is a reflection of what motivates you.
- ✉ It is your collective sense of what is important and why.
- ✉ Like magnetic north it guides you, without being necessarily reached.
- ✉ It ensures objectives, goals and actions move you towards what you want.





Discussion:

Metzger Family HG collage

Handout - Pollywog Farm Holistic Goal

Handout - Developing your own Holistic (Farm &/or Family) Goal



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Testing Guidelines

Holistic Management practitioners use all the common means of making decisions. In addition, you use **seven testing guidelines**. The testing guidelines are used to help determine whether a potential action will lead towards or away from your Holistic Goal.

The testing guidelines seek to ensure that a **potential action or decision**:

- ✉ Truly addresses the root cause of a problem
- ✉ Does not adversely affect people whose support you need (create a social weak link)

Testing Guidelines Continued...

- ☒ Takes into account the weakest stage of an organism's lifecycle (biological weak link)
- ☒ Addresses the most pressing element in your enterprise(s) relative to your financial plan (financial weak link)
- ☒ Is the best choice in terms of time and money invested, if comparing two or more options
- ☒ Is clear in terms of the gross profit it will generate, when considering two or more options
- ☒ Matches up with a family's value system for issues involving money and energy resources
- ☒ Will address any impacts on your future resource base, as described in your Holistic Goal
- ☒ Feels right, a "gut check"

Testing Guidelines Continued...

Not all of the testing guidelines apply in all situations. Those that do not apply are **not used**.

Use of the testing guidelines does not insure a perfect decision, it simply ensures that decisions are analyzed for their economic, environmental, and social impacts before being implemented.

Impacts of Holistic Management

The following examples were taken from:

- ✉ The Holistic Management International web
- ✉ Individuals I am working with
- ✉ My personal / family experiences

Impact of Holistic Management on Farms and Families - Anecdotes

Sandy Matheson (Washington State) - "We were in debt and getting deeper. There didn't seem to be a way out. Our farm which traditionally lost a great deal of money, is now profitable. Pasture productivity has also increased. The plants are healthier and so are the cattle. We're spending less money on supplemental feed. We're proud of what we have accomplished."

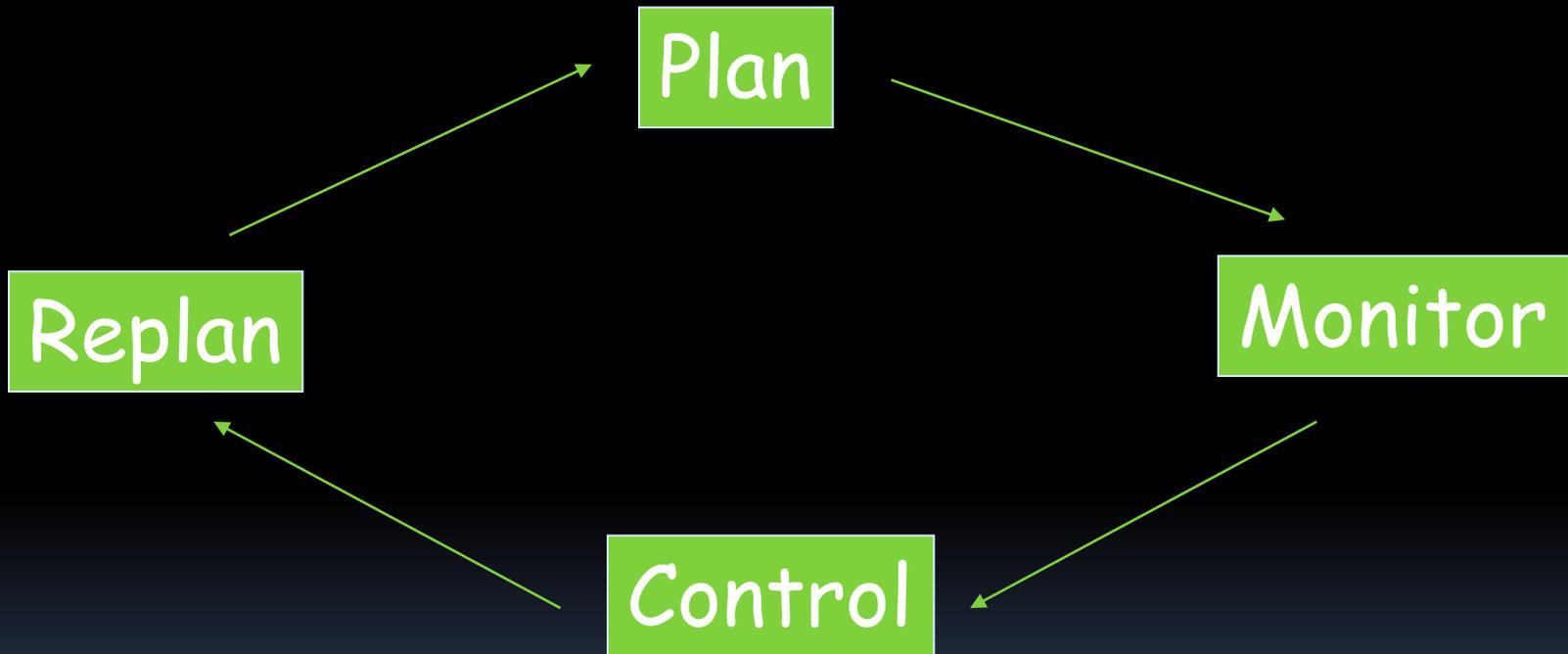
Anecdotes (continued)

- ✉ CJ and Vic Vidler (Sherburne, NY) - Managing holistically has allowed us to start our business while keeping things in balance. We were very successful in our first year because we made good decisions.
- ✉ Tricia Park (DeRuyter, NY) - It improved our management and financial planning. In the first year, by using the testing questions and analyzing our enterprises, we increased our profitability by \$7,000 and had more time for other things we wanted to do.

My Personal Experiences

- ✉ People who I have worked with - feel empowered to make a difference in their own lives. They feel more in control and are able to shake off many of the frustrations of our modern world. Some have family members expressing feelings and opinions that they have never heard before.
- ✉ Practicing Holistic Management has strengthened my resolve to accomplish and do what I truly want. It has impacted my family and allowed us to better define the life we want to live. This not only impacts our family life, but impacts our careers, community and extended family & friends.

Monitoring



Self-Test

- ✉ How do you make decisions?
- ✉ What do you consider when making a major decision? When making minor decisions?
- ✉ Do you consider impacts on your family, your friends, your neighbors, the environment and your check book before moving forward with an action?

If not, what is the cost in terms of the quality of your life?