

**Farm Assessment Outline --> created by Missy Bahret, Old Friends Farm**

[farm name] CONFERENCE  
Overall Review of [current/finishing year]

Date:

Decision Makers:

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**OVERALL REVIEW**

Review Holistic Goal

Successes/Highlights (Overall)

Assessment of Changes

List changes implemented this year [review the Ideas for Improvement sections of the previous years' conference]

Review how those changes went

Challenges (overall & per crop; do RC|PC|MC on the master sheet of your cropplan)

RESOURCE CONVERSION    PRODUCT CONVERSION    MARKETING CONVERSION

[list here]

[list here]

[list here]

Remember:

Resource Conversion (sunlight to plants; or other raw resource into something)

Product Conversion (plants to product or services)

Marketing Conversion (product/services to money)

Assess the Time Management Quadrant the farm existed in most often:

	<b>URGENT</b>	<b>NOT</b>
<b>IMPORTANT</b>	Crisis Management	Planned Management
<b>NOT IMPORTANT</b>	Out of Control 'Management'	Trivial 'Management'

Remember: Use this tool to help your needs: this can be done per decision maker, per season, or all of the above! If it is too hard to pick a box, put a dot in the location that best describes the time management approach overall (as if there were a continuum between the boxes). This is also a good tool to have each employee do to assess each manager.

Ideas for Improvement

Describe the change AND the systems, processes, skills and/or habits needed to improve these challenge areas.

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## SOCIAL REVIEW

Successes  
Challenges  
Ideas for Improvement

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## FINANCIAL REVIEW

Income Review  
Income Projection for [next year]  
Expenses Review  
Expenses Projection for [next year]

[List expenses in appropriate column]

WEALTH GENERATING      INESCAPABLE      MAINTENANCE      NOT SURE

Remember: Prioritize expenses to maximize investment (the last expense to be cut is anything that is wealth generating.) In controlling expenses, cut back on maintenance expenses, then inescapable, and only lastly (if at all) wealth generating. The key to generating wealth is not in the things you sell, but in how you reinvest the money earned.

Ideas for Improvement  
[Create a budget for next year.]

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## ENVIRONMENTAL REVIEW

List Land Use Successes and Challenges

[List in appropriate column]

WATER CYCLE      COMMUNITY DYN.      MINERAL CYCLE      ENERGY FLOW

Remember the basic goals:

Reduce imports

Increase biodiversity (leads to increased stability)

Maximize the flow of solar fuel through plants and soils

Construct a basis for regenerative management

Ideas for Improvement  
[Describe the change (systems, processes, skills and/or habits) needed in order to improve these challenge areas.]

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## GOALS FOR THE FARM FOR [year]

General/Overall:

Social:

Financial:

Environmental:

Revised Holistic Goal:

Remember:

The more you read these, the more real they become.

Post this goals list in a central place for everyone to see.

Suspected Challenges:

Ideas for countering above challenges:

Goal Monitoring- how, when, who [allocate and delegate so there are many people leading the farm towards these goals]

**Market Potential Chart (example is for farmer's markets)**

FARMERS MARKET	ave. sale/customer	per day: average	gross	ave. sale/customer	per day: average	gross	notes on how to meet potential

List each market and current stats. Potentials can most drastically be made by increasing your average sale per customer, OR increasing your customer quantity. Other ways to meet your financial potentials: change your product line to best meet demand, make display changes to enhance visibility, marketing strategies to encourage sales of higher priced items, etc.