

Virginia Whole Farm Planning: An Educational Program for Farm Startup and Development

Introduction to Whole Farm Planning



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Preface

Welcome to the **Beginning Farmer and Rancher Coalition Program's Whole Farm Planning curriculum!**

How to Use This Workbook

This material is organized into five modules that may be used as stand-alone resources to address specific areas of whole farm planning. However, we suggest that the modules may be most beneficial to beginning farmers and ranchers if they are used as a series of educational sessions designed to encourage reflection, goal setting, and steps to organize a new farming enterprise.

Advice for Beginning Farmers

We encourage you to begin by first exploring the Introduction to Whole Farm Planning module. This resource will offer you the opportunity to examine your personal and business goals and priorities. Once you have completed this introductory module, you are welcome to explore the other resources in a sequence that best addresses your questions and ideas for your farming enterprise.

Advice for Service Providers

Thank you for choosing to use our curriculum in your whole farm planning educational program. As an experienced education service provider, you are encouraged to adapt these resources to best serve the needs of the people you work with. The materials are intended to be used as stand-alone pieces or in various combinations of instructional formats, as needed by your program participants.

Modules

Each module is organized at the introductory to intermediate stage of farming knowledge and experience. At the end of each module, additional resources and Virginia service provider contact information are available to help continue the farm planning process.

- **Module I. Introduction to Whole Farm Planning** – The purpose of the first module is to help beginning farmers and ranchers in Virginia make informed farm planning decisions by introducing them to the whole farm planning process.
- **Module II. Marketing** – The marketing module is designed to help beginning farmers and ranchers develop and implement their goals for market analysis, product establishment, and development of viable marketing channels.
- **Module III. Whole Farm Business Management and Planning** – In this module, you will develop and implement early financial and resource management goals as part of the whole farm plan.
- **Module IV. Land Acquisition and Tenure** – This module will help beginning farmers and ranchers develop and implement farm tenure and transfer goals as part of the whole farm plan. Established farmers who are planning for the transfer of their farm may also find this module useful.
- **Module V. Sustainable Farming Practices** – The last module is designed to help beginning farmers and ranchers develop and hone their skills and knowledge in the fundamental production practices associated with establishing and growing a wide range of plants and animals. This information is broken down into 3 separate modules titled as “Sustainable Farming Practices 1-3.”

Please see glossary at end of module for a reference of terms used.

Why This Curriculum? The Beginning Farmer Situation

Emerging trends in U.S. agriculture suggest that in order to enhance our agricultural resource base, we need to establish, sustain, and preserve our farms, farmers, and farmland. A growing number of nongovernmental groups, Cooperative Extension services, and U.S. Department of Agriculture agencies are working to improve the viability of new farms and the economic, social, and environmental fabric in which they are entrenched (Niewolny and Lillard 2010). These initiatives are responding to the overwhelming concern about the steady decline in the number of individuals entering agricultural careers, coupled with an increase in the number of exiting farmers and ranchers (Ruhf 2001).

The current population of beginning farmers and ranchers is diverse and varies by location across the nation (Ahearn and Newton 2009). On average, beginning farmers operate smaller farms — in size and gross dollars — compared to established farmers (Ahearn, Yee, and Korb 2005). While beginning farmers tend to be younger than established farmers, about a third of beginning farmers are at least 55 years of age or older (Ahearn and Newton 2009). Beginning farmers, along with limited-resource and socially disadvantaged farmers, make up at least 40 percent of all U.S. farms (Nickerson and Hand 2009).

The Bureau of Labor Statistics (U.S. Department of Labor 2009) recently reported a large job decline for farmers and ranchers and projects an 8 percent decrease in the number of farmers and ranchers between 2008 and 2018. The age distribution of today's farmers and ranchers is also a critical issue. According to the "2007 Census of Agriculture" (USDA-NASS 2009a), the average age of a principal farmer is 57 years old. More than 63 percent of all established farms in 2007 were headed by a principal farmer age 55 or older; only 5 percent of all principal farmers were 35 or younger (Ahearn and Newton 2009). The aging population of U.S. farmers and ranchers is expected to increase in the next census while the number of young farmers is likely to decline.

The 2007 Virginia census also illustrates a significant need to establish and retain beginning farmers and ranchers based on the economic structuring of the industry. Agriculture provides \$55 billion in income per year and about 357,000 jobs, making it an important industry for the commonwealth. Of the 47,383 farms in Virginia, 92 percent reported less than \$100,000 in sales, while 8 percent of the total farms accounted for 85 percent of total farm sales (USDA-NASS 2009b).

Virginia is also among the most expensive states for farmland, making it difficult for aspiring agriculturists to purchase suitable acreage. The average farm comprises 171 acres, while 77 percent of the total farms in Virginia operate on fewer than 180 acres (USDA-NASS 2009b).

Little is known about the 13,206 principal farmers in Virginia who have been on their current farms or ranches for nine or fewer years. The majority of all farmers in Virginia are white males, though the number of minority farmers such as women and African Americans is on the rise (USDA-NASS 2009b). Production crops and practices differ regionally and culturally, especially between rural and urban centers. Consumer demand for local and regional food, however, is growing throughout Virginia.

Background on the USDA Beginning Farmer and Rancher Development Program

Beginning farmer education for adult and young audiences in the United States can be generally traced back to the advent of the 1862 and 1890 Morrill Land Grant acts. But for the first time, the Food, Conservation, and Energy Act of 2008 (the 2008 Farm Bill), appropriated \$75 million for fiscal years 2009 to 2012 to develop and offer education, training, outreach, and mentoring programs to enhance the sustainability of the next generation of farmers.

The reasons for the renewed interest in beginning farmer and rancher programs are:

- The rising average age of U.S. farmers.
- The 8 percent projected decrease in the number of farmers and ranchers between 2008 and 2018.
- The growing recognition that new programs are needed to address the needs of the next generation of beginning farmers and ranchers.

According to the 2008 Farm Bill, a beginning farm is considered one that is operated by one or more operators who have 10 or fewer years of experience operating a farm or ranch. In 2007, approximately 21 percent of family farms met that definition.

Since its inception, BFRDP has funded many projects to train, educate, and provide outreach and technical assistance to beginning farmers on one or more of the following topics:

- Production and management strategies to enhance land stewardship.
- Business management and decision support strategies that enhance financial viability.
- Marketing strategies that enhance competitiveness.
- Legal strategies that assist with farm or land acquisition and transfer.
- Other priority topics to enhance competitiveness and sustainability of beginning farmers and ranchers for the next generation.

Background on the Virginia Beginning Farmer and Rancher Coalition Program

The Virginia Beginning Farmer and Rancher Coalition Program aims to improve opportunities for beginning farmers and ranchers to establish and sustain viable agricultural operations in Virginia through the development and enhancement of whole farm planning programs, online resources, and farmer mentoring networks. www.vabeginningfarmer.org.

Beginning Farmer Audience

This curriculum is aimed at addressing the needs of the spectrum of beginning farmers and ranchers in Virginia. We recognize a diversity of farming experiences, backgrounds, and aims held by Virginia's beginning farmers and ranchers. Many groups find it useful to look at the stages of commitment, decision-making, and skills that farmers pass through as they begin a career in farming. Drawing on the work of Sheils (2004), the following categories provide a helpful guide to understanding this pathway.

Prospective or explorer farmers – Individuals interested in starting a farm or ranch. This includes next-generation farm family members as well as those who do not come from a farming background.

Startup farmers – Individuals who are in the early stages of their agricultural operation, often within the first one to three years of farming or ranching.

Re-strategizing farmers – Farmers who are making changes to their operations after farming for a few years. These individuals usually have increased decision-making responsibility and commitment to farming.

Establishing farmers – Farmers who are expanding, diversifying, and stabilizing their growing farm or ranch.

Transitioning farmers – Individuals who are family farm members who have decision-making roles on the farm without having primary farm operator status.

These categories of farmers are a modification of those referred to by the New England Small Farm Institute. For the full reference, see "What Does the Term 'New Farmer' Mean?" (Sheils 2004).

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The Virginia Beginning Farmer and Rancher Coalition comprises innovative agriculture businesses and organizations from across the commonwealth. These include:

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Appalachian Sustainable Development
Attimo Winery
Farm Service Agency, U.S. Department of Agriculture
Fauquier Education Farm
Grayson LandCare
Hethwood Market
Laurel Farm
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Virginia Farm Bureau Young Farmers
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This committee consists of seven committed individuals from the coalition who represent farmer and service provider perspectives in Virginia. This elected committee is responsible for guiding program activity to best address the expressed needs of the coalition.

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Program Management Team

The Program Management Team is housed at Virginia Tech. The team is primarily responsible for the management and evaluation of program activity. This team has evolved over the course of the last few years. We would like to recognize everyone for their contributions. The following VBFRC partners served as the original Steering Committee.

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Module I. Introduction to Whole Farm Planning

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Module I. Introduction to Whole Farm Planning

Introduction

The purpose of the Introduction to Whole Farm Planning module is to help beginning farmers and ranchers in Virginia make informed farm planning decisions by introducing them to the whole farm planning process.

This first module includes key concepts, worksheets, and examples to provide the framework and inspiration you will need to plan your own farm.

Four additional modules will guide you in developing the whole farm plan by focusing on the following areas.

- **Module II.** Marketing
- **Module III.** Whole Farm Business Management and Planning
- **Module IV.** Land Acquisition and Tenure
- **Module V.** Sustainable Farming Practices

This introductory module is supported by several key resources that are designed to prepare beginning farmers to begin developing their whole farm plan for short- and long-term farming success. Several resources that provide essential material are listed here. Full references of these resources are listed at the end of this module.

- “Whole Farm Planning Model,” Ohio State University Extension (Marrison 2007).
- “Whole Farm Planning for Economic and Environmental Sustainability,” Kansas State University Research and Extension (Janke 2000).
- “Whole Farm Planning: Combining Family, Profit, and Environment,” University of Minnesota Extension Service, Minnesota Institute for Sustainable Agriculture (Mulla, Everett, and DiGiacomo 1998).
- “Holistic Management: A Whole-Farm Decision Making Framework,” U.S. Department of Agriculture, National Center for Appropriate Technology (Sullivan 2001).



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The worksheets for this module begin on page 24.

Worksheet 1.

Describe Your Ideal New Farming Enterprise (page 24)

Worksheet 2.

What Does Farming Success Look Like to You? (page 25)

Worksheet 3.

Family Goal Setting (page 26)

Worksheet 4.

Farm Goal Setting (page 28)

Worksheet 5.

Assessing Your Quality-of-Life Preferences (page 29)

Worksheet 6.

Assessing Your Personal Resources Inventory and Goals (page 30)

Worksheet 7.

Assessing Your Land and Infrastructure Resources (page 32)

Worksheet 8.

Assessing Your Financial Resources (page 35)

Worksheet 9.

Assessing Your Production and Stewardship Preferences (page 37)

Worksheet 10.

Assessing Your Marketing Options and Preferences (page 39)

Worksheet 11.

Action Planning (page 41)

Additional Resources

The following are additional resources you may consider using in the module as supportive material. They are not required in order to complete the module, but they are helpful for further reading and assessment. These resources are referenced where appropriate and fully listed in the reference section.

- The “Exploring the Small Farm Dream: Is Starting an Agricultural Business Right for You?” workbook (Hayes 2004) from the New England Small Farm Institute is a popular resource to help beginning farmers start to plan for a new farm enterprise. We draw on this workbook as an additional resource that may be used in this module. For more information about this workbook, please visit www.smallfarm.org.
- “Whole-Farm Planning: Ecological Imperatives, Personal Values, and Economics” (Henderson and North 2011), from the Northeast Organic Farming Association, is a resource that focuses entirely on the purpose and practice of whole farm planning. We draw on it as an additional resource in this module.

Objectives of Module

The Introduction to Whole Farm Planning module is designed to help beginning farmers and ranchers develop and implement informed farm planning decisions by introducing them to the whole farm planning process.

The module includes foundational concepts and worksheets to help you assess your resources and preferences for successful startup planning.

Participants who complete this module will understand:

- The whole farm planning process.
- How to access resources to begin farm planning and startup.
- The actions needed to take the next step.
- Resources available for continued whole farm planning.

Unit 1. Getting Started in Farming

1.1 Assessing the Possibilities

Starting a farm is an exciting yet challenging opportunity. As with any new lifestyle undertaking, there is a lot to think about **before** beginning a farm venture. The list of questions to explore is long. For example:

- What are your motivations to start a farm?
- What resources do you have to make this farm a reality?
- How much capital are you able to invest?
- Do you have suitable farmland?
- Do you want to farm full-time or part-time?
- What kinds of production practices do you need to know?
- How and where will you market what you will grow or raise?
- Do you have the skills, knowledge, and networks to be successful?
- What does a successful farm look like to you?

According to Hayes (2004) in the “Exploring the Small Farm Dream” workbook, these are just some of the key questions you should consider as you move toward developing your new farm.

The purpose of this first module is to help beginning farmers and ranchers in Virginia make informed farm planning decisions by introducing them to the whole farm planning process.

The holistic approach to farm planning is designed to help you develop important farming goals and action plans by balancing quality-of-life needs, farm resources, production aims, profitability needs, and farmland stewardship objectives. This first module includes key concepts, worksheets, and examples to provide the framework and motivation you will need to plan your own whole farm.

Setting the Groundwork for In-Depth Assessment

As you consider a specific farming idea, this planning process will help you assess whether or not your resources and goals fit well with the proposed enterprise. If there is a good fit, then this foundational work can offer a valuable starting point on which to take action to begin or expand your farming venture. These actions might include:

- Creating a mission statement.
- Drafting a business plan.
- Developing a marketing strategy.
- Locating farmland.
- Finding new learning opportunities to continue your progress.

Teaching and Learning Tools

Please follow the instructions under each of the headings below. The instructions will refer to specific readings or worksheets that follow the unit.

Helpful hint: Keep worksheets and readings organized in a special folder or binder to help you build your whole farm plan!

Unit 1.1

Assessing the Possibilities

Resources

Read: Preface of this module for background information (pages 3-6).

Teaching and Learning Tools

Complete: Worksheet 1.

Describe Your Ideal New Farming Enterprise (page 24)

Complete: Worksheet 2.

What Does Farming Success Look Like to You? (page 25)

This process is also designed to help you determine if starting a farm is a good step forward. That is, will it help you answer the big question: Is farming a good fit for you? If you learn that starting and owning a farm is not the right option, then perhaps the whole farm planning process will offer you other ideas and suggestions to consider, including other opportunities in the field of agriculture.

What Does Your Successful Farm Look Like?

Before you begin the whole farm planning process, it is important that you assess your new farm enterprise idea. The following worksheets are designed for you to put your ideas on paper so you can revisit them as needed.

Complete worksheet 1, Describe Your Ideal New Farming Enterprise; and worksheet 2, What Does Farming Success Look Like to You?

Worksheet 1. Describe Your Ideal New Farming Enterprise

This worksheet is designed to help you better define your ideal farming enterprise. There are many ways you can describe your farm and farming enterprise. Key questions this activity aims to help you answer include:

- What kind of agricultural enterprise do you envision having?
- Where is it located?
- Who is involved?
- What makes it unique?
- What do you need to know or do to make this agricultural enterprise a reality?

Worksheet 2. What Does Farming Success Look Like to You?

After you have answered the questions on the previous worksheet, complete worksheet 2, which helps you define what farming success means to you. Keep in mind that farming success may be very different to different farmers. What are those key elements you need to keep farming successfully?

Common Opportunities and Roadblocks

According to Hayes (2004), there are many reasons why someone would want to become a farmer and own an agricultural business. Your reasons are important, and they should be explored as you develop your whole farm plan. The remainder of this module and the following modules are designed to help you better understand the challenges and rewards of owning and operating a farm enterprise.

Becoming an Agricultural Business Owner

Farming is a very diverse profession. It is many things to many people who can be successful at different scales of production. Most beginning farmers are small-scale farmers whose operations are moderate in acreage and gross profit.

All new farmers, however, have to consider the different roles farmers take on: production manager, land steward, marketing and sales associate, business manager and financial planner, equipment technician, and employer. The actuality of owning and managing a new farm business is perhaps the starkest reality of them all. Following are some questions to consider.

- Will you farm part-time or full-time?
- Will you farm with others or by yourself?
- Do you require off-farm income?
- Is the land owned by you or by another party?
- Will you hire off-farm labor?

Quality of Life

Quality-of-life considerations are personal and refer to your desire for well-being and home-life satisfaction. It is important to balance the day-to-day work of farming with your quality-of-life goals. Balancing quality-of-life considerations with the on-the-ground realities of developing a new farm is an ongoing struggle for many. Numerous challenges lie ahead — challenges that will require difficult decisions and negotiation with others (and with yourself). The key to successfully addressing these challenges is to set well-defined quality-of-life goals. As part of the whole farm planning process, you will be asked to include your quality-of-life goals.

The whole farm planning course work will help you understand how important it is to plan holistically for your business, employment status, land stewardship goals, and quality-of-life needs. By understanding this process, better farming outcomes will follow.

Teaching and Learning Tools

Additional Resource

Additional activity related to this discussion is in the Quality of Life Considerations section of “Exploring the Small Farm Dream,” pages 20-23 (Hayes 2004).

Teaching and Learning Tools

1.2

Experiences from the Field

To gain access to these stories, you may read a copy of the Virginia Beginning Farmer Profiles from the Virginia Beginning Farmer and Rancher Coalition Program, or you may visit the Virginia Beginning Farmer and Rancher Coalition YouTube Channel for video access.

Resource

Read: Virginia Beginning Farmer Profiles from the Virginia Beginning Farmer and Rancher Coalition Program.

www.vabeginningfarmer.alce.vt.edu/resources/publications/profiles.pdf

View: Virginia Beginning Farmer and Rancher Coalition YouTube Channel:

www.youtube.com/user/VABeginningFarmers

Additional Resource

An additional resource related to this discussion is An Evaluation of Educational Program Training and Resource Needs of Virginia Beginning Farmers from the Virginia Beginning Farmer and Rancher Coalition Program.

www.vabeginningfarmer.alce.vt.edu/resources/publications/evaluation-pub-ae81.pdf

1.2 Experiences From the Field: Beginning Farmers in Virginia

Several beginning farmers and ranchers in Virginia have shared their stories so others can learn from their experiences. Their stories have been manually and digitally recorded, and they cover a range of themes relevant to the whole farm planning process. You are encouraged to read or listen to their experiences as you develop your enterprise.

Following is a short description of five beginning farmer profiles.

Louis White, Russell County

Located in Cedarville, Virginia, Louis White operates White Farm, a family-owned and -operated livestock enterprise. The farm also produced tobacco initially, but in recent years, the operation has focused on beef cattle — primarily Black Angus. When sold, most of the cattle are shipped directly to feedlots in the West.

Megan Seibel, Botetourt County

Mountain View Farm and Vineyard, a wine and cattle operation located in Roanoke, Virginia, is family-owned and -operated by Andy and Megan Seibel. Five hundred acres support the operation, 20 of which are planted in grapes and produce 75 tons of eight grape varieties. The first vines were planted in March 2000.

Erik Croushorn, Prince William, Fauquier, and Culpeper Counties

Croushorn Farms are diversified livestock and vegetable farm enterprises, located in Prince William, Fauquier, and Culpeper counties. More than 470 acres of land support the production of beef cattle, hay, and row crops, as well as vegetables and eggs. Croushorn manages operations on the more than 100-year-old farms.

Mark Seitz, Fauquier County

Huntley Farm and Seitz Angus are cattle operations located in Fauquier County, Virginia. Mark Seitz oversees about 2,300 head of cattle as the herdsman for Huntley Farm. Along with his wife, he owns and operates Seitz Angus, which produces approximately 200 head of cattle, as well as hay and corn.

Marvin Thornton, Sussex County

Marvin Thornton operates Thornton Raspberry Farm, a peanut and raspberry enterprise on 120 acres in Wakefield, Virginia. Initially a farmer of cotton and soybeans, Thornton started producing peanuts about nine years ago and recently added raspberries. Thornton has about 120 plants and three varieties of this “super fruit” located in high tunnels.

Unit 2. What Is a Whole Farm Plan?

2.1 Defining Whole Farm Planning

According to the resources used in this module, whole farm planning can be defined as a holistic four-step process that can be used by beginning farmers to help balance the quality of life they desire with the farm's resources, the need for production and profitability, and long-term stewardship.

Most farmers do some kind of planning nearly every day. Whole farm planning is distinct from other farm planning approaches because it ties together all the planning done for the entire farm. It also bases planning on your evolving, long-term vision. The planning approach is designed to be flexible.

A key benefit of whole farm planning is maintaining or improving profitability while enhancing sustainability. Whole farm planning can also lead to protection and enhancement of the quality of soil, water, and other natural resources on and near the farm. In addition, the planning process helps you define long-term and short-term goals. These goals can help you achieve a better quality of life at home and in your community.

2.2 Whole Farm Plan Models and Process

There are several whole farm planning models to consider. Each has its strengths and weakness. Instead of selecting one particular model for this course work, it will be helpful for you to become familiar with what whole farm planning is by briefly reviewing the following models and their sources.

- “Holistic Management: A Whole-Farm Decision Making Framework,” U.S. Department of Agriculture (Sullivan 2001). <https://attra.ncat.org/publication.html>.
- “Whole Farm Planning Model,” Ohio State University Extension (Marrison 2007). <http://ohioline.osu.edu/bst-fact/pdf/3608.pdf>.
- “Whole Farm Planning for Economic and Environmental Sustainability,” Kansas State University Research and Extension (Janke 2000). <http://www.ksre.ksu.edu/bookstore/pubs/mf2403.pdf>.

If we bring these models together at their most basic levels, we can begin to see how the whole farm planning process involves four phases. This four-step planning process is not linear. Each of the phases is linked together in a cycle that includes decision-making for:

1. Setting goals.
2. Making an inventory of farm resources and preferences.
3. Developing and implementing an action plan.
4. Monitoring on-farm progress toward goals (revisiting plan and goals).

Teaching and Learning Tools

2.1

Defining Whole Farm Planning

Resource

Read: “Whole Farm Planning: Combining Family, Profit, and Environment,” pages 1-4, from the Minnesota Institute for Sustainable Agriculture (Mulla, Everett, and DiGiacomo 1998).

2.2

Whole Farm Plan Models and Process

Resources

Read: “Holistic Management: A Whole-Farm Decision Making Framework,” pages 1-9, U.S. Department of Agriculture (Sullivan 2001).

Read: “Whole Farm Planning Model,” pages 1-4, Ohio State University Extension (Marrison 2007).

Read: “Whole Farm Planning for Economic and Environmental Sustainability,” pages 1-7, Kansas State University Research and Extension (Janke 2000).

Teaching and Learning Tools

Read: “Whole Farm Planning: Combining Family, Profit, and Environment,” pages 4-7, University of Minnesota Extension Service (Mulla, Everett, and DiGiacomo 1998).

The whole farm plan is much more than a plan. It is a process for short- and long-term decision-making and evaluation that takes into consideration the whole farm. Figure 1 illustrates the dynamic, whole farm planning process.

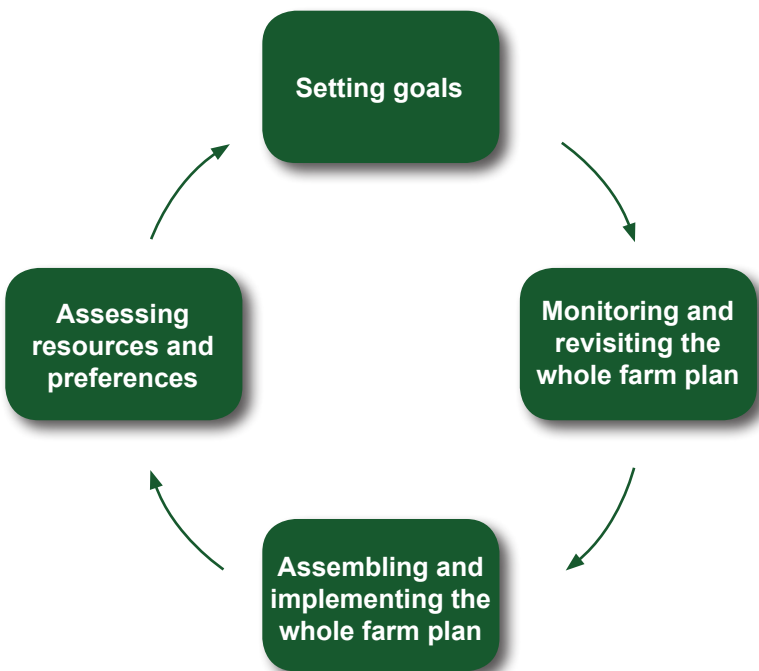


Figure 1. The whole farm planning process. Adapted from Janke 2000, Marrison 2007, and Sullivan 2001.

2.3 Whole-Farm Planning Concepts

It is important to remember that whole farm planning is a process that includes all components of the farm and requires you to develop action items and timelines and to assess your progress. According to Kemp (1996) at The Minnesota Project, there are several key concepts that will help you develop your whole farm plan.

- The farmer is the author of the whole farm plan — not a consultant or service provider.
- Whole farm planning is a process, not a product.
- The entire farm is included in the plan.
- Actions with timelines (and alternatives) are developed.
- Progress is measured and the plan is revisited.
- This process is self-guided and completely voluntary.
- The whole farm plan is a document that may include spreadsheets, text-based notes, maps, images, etc.

2.4 Setting Your Whole Farm Goals

It is time to begin laying out your goals to take that first step toward developing a whole farm plan. As stated earlier, there are many questions and considerations to keep in mind as you identify goals for your new farm enterprise. These areas will be discussed in-depth in the next section (2.5) on assessment, but it is helpful to point them out here as you begin listing your whole farm goals.

- Quality of life.
- Forms of production.
- Future resource base.

After listing your family and farm goals, you should have a clearer picture about the goal-setting process in which all members of the family and farming enterprise participate. The short- and long-term goals set the stage for your whole farm plan as a tool to guide important farm planning, assessment, and management decisions. Once goals have been set, you can move toward the inventory stage of the whole farm planning process.

2.5 Inventory of Resources and Preferences

There is great value in imagining your “ideal” farm and in looking at all its possibilities. Getting from the initial idea or dream farm to the reality is an evolving process. What you envision at the start is sure to change as you progress.

As you proceed throughout this module and move into the future pursuing your farm dream, we encourage you to continue to think about your overarching values and principles. They — as well as the social, cultural, and geophysical contexts — form the foundation for the dynamic assessment process presented in this unit. Even if you don’t have your farm plan fully developed, don’t be discouraged; remember that determining your farm plan takes time and hard work!

Quality-of-Life Preferences

Farming is a lifestyle. Your preferences for a specific farming lifestyle are personal. These preferences are guided by your values and your worldview. As you consider your values and principles, there will be aspects of your ideal farm that you will identify as “must haves” and other aspects you will be willing to compromise on. It is important to realize that incorporation of the must-have aspects may have associated costs. A part of the evolving whole farm planning process is about recognizing what is and is not dispensable.

Personal Resources

Regardless of the type of farm enterprise you envision, you are the heart of this business. Your passion, vision, dreams, plans, and hard work are

Teaching and Learning Tools

2.4

Setting Your Whole Farm Goals

Resources

Review: “Whole Farm Planning for Economic and Environmental Sustainability,” Kansas State University Research and Extension (Janke 2000).

Complete: Worksheet 3. Family Goal Setting (page 26)

Complete: Worksheet 4. Farm Goal Setting (page 28)

Additional Resource

Additional reading and activities related to this discussion are in the Northeast Organic Farming Association handbook, “Whole Farm Planning: Ecological Imperatives, Personal Values, and Economics,” pages 17-27 (Henderson and North 2011).

2.5

Inventory of Resources and Preferences

Resources

Complete: Worksheet 5. Assessing Your Quality of Life Preferences (page 29)

Teaching and Learning Tools

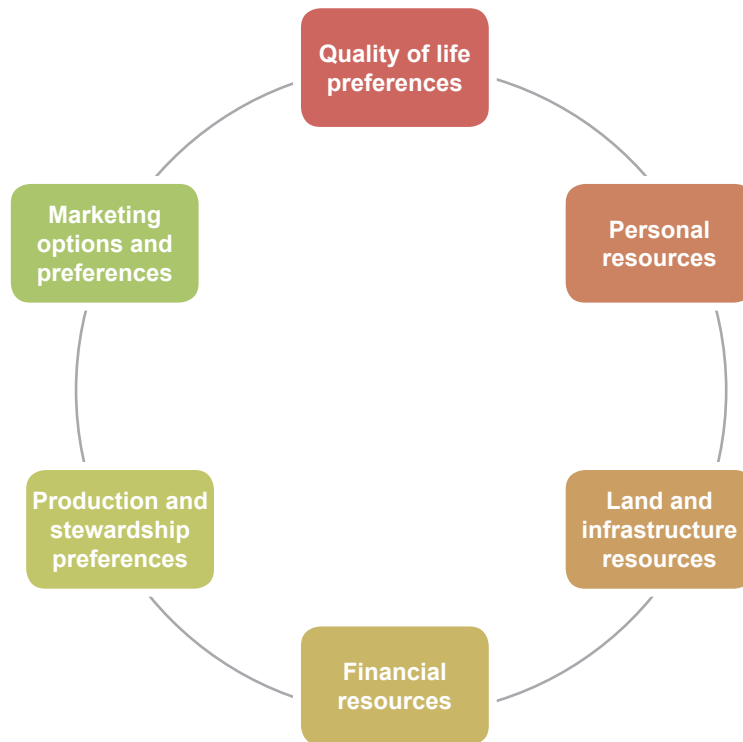


Figure 2. Whole farm plan inventory (assessment).

Complete: Worksheet 6.
Assessing Your Personal Resources Inventory and Goals (page 30)

Complete: Worksheet 7.
Assessing Your Land and Infrastructure Resources (page 32)

what will create and nurture this venture. The whole farm plan inventory provides an opportunity to take stock of what you bring to the farm dream by helping you identify your strengths as well as what you still need to develop in order to see your dream become a reality. This exercise should also be completed by each person who will be integrally involved in the farm operation.

Land and Infrastructure Resources

A critical part of whole farm planning is to have a thorough knowledge and understanding of the resources of the actual farm site. Whether you own land or are considering the purchase or rental of property, the more complete the site inventory, the more information you have available to design a whole farm plan that is adequately suited to the distinct characteristics of the site. Use this initial inventory as a good starting point on which to build your developing farm design.

Financial Resources

A common mistake for many new small businesses is not having enough money to get the farm venture up and running and to keep it going. This is not to say you must have saved all the money you need before thinking about delving into the realm of starting up a farm business; however, you do need to have some capital, as well as an acute awareness of the financial resources and tools available to you that can augment and fortify your own financial capital. Further, it is important to consider other aspects of the business. Like with the other inventories, this assessment is intended to be used as baseline data.

Production and Stewardship Preferences

Regardless of what product(s) you plan to grow or raise, a central question to consider is the type of production management system you will implement. Module V on sustainable farming practices explores these systems in greater detail. Taking time now to assess your production and stewardship goals and preferences is a necessary first step to decide what and how you will grow or raise.

Some questions to consider include:

- The scale of the operation.
- The degree of diversity and how components will be integrated.
- How you will reach your stewardship goals, given what you know about the land and resources at your farm site.

Marketing Options and Preferences

There are two main categories of markets — direct and wholesale. Each type has its advantages and disadvantages, but the choice of markets comes back to the whole farm planning process and understanding how all the parts fit together in the context of your guiding values and principles. Taking the time to fully explore the marketplace is crucial before any actual farm enterprise decisions are made because all too often products are grown or raised without a firm plan as to where that product will be sold or whether the venue is a good fit for the grower.

Some of the key considerations to understand are the location of the farm, accessibility of markets, market potential (marketability of your product), associated marketing costs, legal issues, and your personal/family characteristics and values.

Teaching and Learning Tools

Complete: Worksheet 8.
Assessing Your Financial Resources (page 35)

Complete: Worksheet 9.
Assessing Your Production and Stewardship Preferences (page 37)

Complete: Worksheet 10.
Assessing Your Marketing Options and Preferences (page 39)

Teaching and Learning Tools

3.1

Tying it All Together: What Are the Next Steps?

Resource

Complete: Worksheet 11.
Action Planning (page 41)

Additional Resource

Read and complete the activities on pages 78-81 in the “Exploring the Small Farm Dream” workbook from the New England Small Farm Institute (Hayes 2004).

Unit 3. Formulating the Whole Farm Plan

3.1 Tying It All Together: What Are the Next Steps?

Whole farm planning requires you to make a set of holistic decisions about the farming process that can lead to success, taking into account the package of farming circumstances and fixed variables with which you begin. Following the whole farm planning process actively puts you in the driver’s seat: Decision-making becomes easier because you can tailor your goals and actions over time to best fit your needs and preferences for long-term viability.

Taking Action: Next Step(s) in Your Planning Process

Now it is time to pull together your “ideal new farm,” definitions of farming success, whole farm goals, and whole farm plan inventory. Take this opportunity to define your action plan with as much detail as you can. Questions you may need to ask include:

- What technical skills do I need to acquire?
- How can I obtain suitable farmland?
- What are my land resources?
- How can I acquire the necessary financial resources?
- What business management skills and resources do I need?
- What kind of market research do I need to conduct?
- What is my personal farming network like?

Once you complete your action planning worksheet, you have taken yet another step toward assembling the whole farm plan. The remainder of the modules will guide you in further exploration through specific farm startup content that is orientated toward beginning farmers in Virginia.

Monitoring Your Goals and Decisions

Complex systems such as farming systems are in a constant state of flux. One way to look at this is that a farming decision you once made may no longer work for your end goal, such as profitability or quality-of-life considerations. You will need to develop a monitoring process so you can test and evaluate your decisions over time. It is important that you and your farming partners or management team decide together on the goals and actions needed to reach those goals.

3.2 Next Steps: Whole Farm Planning Modules

The whole farm planning course is organized into five modules. You have just completed the first module, Introduction to Whole Farm Planning. This module was intended to set the stage for you as a beginning farmer ready to take the next steps through the planning process. The four modules that follow will guide you in developing the whole farm plan by focusing on the following themes:

Module II. Marketing

Module III. Whole Farm Business Management and Planning

Module IV. Land Acquisition and Tenure

Module V. Sustainable Farming Practices

These modules are designed with the beginning farmer as the primary learner. Topics and activities within each of the modules are purposefully organized at the introductory to intermediate stage of farming knowledge and experience. At the end of each module, you will find additional resources and Virginia service provider contact information so that you may continue improving on your planning process.

This worksheet is designed to help you better define your ideal farming enterprise for today's agricultural context.

Key questions this activity aims to help you answer include:

- What kind of agricultural enterprise do you envision having?
- Why do you want to own and operate a farm?
- What do you need to know or do to make this agricultural enterprise a reality?

Worksheet 1.

Describe Your Ideal New Farming Enterprise

Step 1. Read the information in the sidebar. Refer to the questions.

Step 2. Reflect on the following phrase and provide a brief response to the questions below: **“When I think of my ideal farm, ...”**

- What kind of enterprise is it (what will you grow or raise)?
- Where is it located?
- Who is involved in the day-to-day operations of the farm? Will you or members of your family work off the farm?
- What is your sustainable competitive advantage (what makes your product or marketing unique)?

Step 3. Use the space below to describe your ideal farm in more detail. Don't hesitate or worry about grammar — just jot it down!

Worksheet 2.

What Does Farming Success Look Like to You?

Step 1. Read the information in the sidebar, then answer the questions below.

- In a few words, how do you define personal and professional success?

- In a sentence or two, how would you describe your successful farm (think in terms of production, marketing, quality of life, etc.)?

- What is your ideal agriculture success story (where you would like to be in 10 years, 20 years)?

Step 2. Use the space below to list two to three key elements (or ingredients) you need in order to start and keep farming successfully.

1.

2.

3.

After you have answered the questions on the previous worksheet, complete this activity that helps you define what farming success means to you.

Keep in mind that farming success may be very different to different farmers.

Worksheet 3. Family Goal Setting

Person

Role

Goal

Source: "Whole Farm Planning for Economic and Environmental Sustainability," Kansas State University Research and Extension (Janke 2000).

Example Worksheet 3. Family Goal Setting

Person	Role	Goal
Joan	Nurse	Work no more than 40 hours per week, no night shifts.
	City Council	Attend all meetings. Head up task force to increase wages for city workers.
	Mother	Attend daughter's home games and band concerts. Be home for dinner each evening. Teach daughter how to cook. Volunteer as chaperone for 2 school events this year.
	Wife	Help husband care for parents.
	Farmer	Help in field during planting and harvest. Help work cattle at weaning.
Bob	Dad	Take daughter to weekend basketball practice games and band practices.
	Husband	Cook dinner at least twice a week.
	Farmer	Maintain steady cash flow and reduce debt on farm this year. Take accounting class and learn to use Fin-Pak on home computer.
	Son	Check in on parents each evening. Bring groceries or take shopping at least once a week.
Jane	Carpenter	Work at least 20 hrs per week during winter months. Make estimated \$xxx income this year.
	Student	Get at least a "B" average. Apply to at least 2 colleges, think about a major.
	Daughter	Help with planting. Drive truck during harvest. Learn to cook.
	Band member	Play in fall orchestra and winter pep band.
	Basketball player	Practice at least once a week year-round, and play "A-Team" ball this winter.

Source: "Whole Farm Planning for Economic and Environmental Sustainability," Kansas State University Research and Extension (Janke 2000).

Worksheet 4. Farm Goal Setting

	Short Term (1–3 years)	Medium Term (3–10 years)	Long Term (10+ years)
Infrastructure			
<i>Land</i>			
<i>Buildings</i>			
<i>Equipment</i>			
<i>Other</i>			
Ecological/Landscape			
<i>Cropland</i>			
<i>Grassland</i>			
<i>Woodland</i>			
<i>Wetlands/Ponds, etc.</i>			
<i>Water courses</i>			
People			
<i>Skills</i>			
<i>Labor</i>			
<i>Communication</i>			
<i>Family/Quality of Life</i>			
Financial			
<i>Production/Enterprise</i>			
<i>Cash Flow</i>			
<i>Debt/Asset</i>			
<i>Marketing</i>			

Source: "Whole Farm Planning for Economic and Environmental Sustainability," Kansas State University Research and Extension (Janke 2000).

Worksheet 5.

Assessing Your Quality-of-Life Preferences

Step 1. Read the information in the sidebar.

Step 2. Reflect on the following question: **What are the defining characteristics that reflect my values?**

For example:

- I care about raising my family in an agricultural tradition.
- I want to make a living off the land.
- I care about earning a living wage for myself (or my family).

Step 3. Dig a little deeper by reflecting on your responses to step 2, then answer the following questions:

- List the top three to four “must haves” of your ideal farm.
 - 1.
 - 2.
 - 3.
 - 4.
- List the parts of your ideal farm you are willing to compromise on.
 - 1.
 - 2.
 - 3.
 - 4.
- What costs (financial or personal) are associated with making sure the must-have aspects are included in the farm plan?
 - 1.
 - 2.
 - 3.
 - 4.

The purpose of this worksheet is to define your guiding personal values and principles as they pertain to your farm dream so you can begin to better envision your ideal farming enterprise.

Remember that there are no right or wrong answers. Rather, your values and principles are a reflection of your unique individuality and form the basis for what guides and motivates your decision-making process.

Worksheet 6.

Assessing Your Personal Resources Inventory and Goals

As you go through this assessment, please take time to answer the questions as completely and honestly as you are able with regard to your skills, knowledge base, experience, time constraints, energy, health, labor, and family considerations.

The questions explore your current resources, as well as what personal resources you might need in order to move toward your whole farm plan goals.

This exercise should be completed by each person who will be integrally involved in the farm operation.

Step 1. Read the information in the sidebar.

Step 2. Reflect on this question: **What knowledge, skill base, or prior experience do you already possess that will help you be successful in owning and operating a farm?**

Then read the following questions and answer them below:

- What previous work experiences or skills can you draw on to start and keep farming?
- What are your communication and marketing skills?
- What kinds of agricultural production and/or processing experiences have you had?
- What kinds of business management skills can you use for your farming enterprise?

Step 3. What additional resources and information do you need to produce, process, and market your product(s)? Prioritize your top three needs.

1.

2.

3.

Worksheet 6, page 2

Step 4. Read and respond to the following questions that address your time management, health, and labor needs.

- Given your current employment responsibilities, how much time can you devote to your enterprise? Be brief and specific.
- Do you have personal commitments that will impact your availability to operate your farm? If so, what are they?
- Are there any health-related issues that may impact running the farm? If so, what needs to be addressed and planned for before moving forward?
- How much labor can you provide for the enterprise? Who else will provide labor?

Step 5. List the top three “must-have” resources and information you need in order to move forward with your farm plans.

1.

2.

3.

One vital area that can be overlooked when considering a farm enterprise is personal health and well-being. Farming can be very physically, emotionally, and mentally demanding. It is good to know your limitations and stress points because all will be tested at some point in a farming career.

Another very important aspect within the personal inventory is to consider how a farm enterprise might impact family life. Farming can be very time-intensive and can place heavy demands on the normal day-to-day dynamics of family living. As you consider your whole farm plan, it is important to evaluate farm goals within this larger family context.

The first goal of this exercise is to create a schematic layout of your farm site that defines the unchanging geological features of the site, as well as identifying the existing infrastructure.

Worksheet 7. Assessing Your Land and Infrastructure Resources

Step 1. Read the information in the sidebar.

Step 2. Create a schematic layout of the site.

The resources listed and the answers to the questions below will help you create a working schematic layout. Some of the key features to include are topographic lines, site orientation, water sources, and any existing infrastructure like roads, points of access to the property, fences, buildings, etc. Once a basic schematic is created, it can be copied over and over to add additional features as well as to revise your farm design ideas as they evolve.

Use these resources to define the unchanging features of your land:

- Topographic maps.
- Google Earth.
- NRCS soil survey maps –<http://websoilsurvey.nrcs.usda.gov/app/HomePage.htm>.
- Property survey.
- Utilities map.

Now, refer to the following questions to determine what to place on the schematic.

- **Water sources**

1. What are the sources of irrigation and drinking water?
2. How dependable are these sources year-round?

- **Infrastructure**

1. What buildings (such as storage sheds, barns, storage tanks, greenhouses) already exist, and what level of repair are they in?
2. Is there fencing, trellising, etc., in place? Where?

Worksheet 7, page 2

- **Accessibility**

1. How accessible are the production fields to water sources, roads, storage areas, and other infrastructure?
2. How accessible is the farm to paved roads, markets, and processing facilities (if applicable)?

Step 3. Assemble a site characteristic inventory.

Climate and microclimate information, identified here, plays a key role in assessing the potential success of specific products grown on your farm.

- **Consider the site's specific soil and land features (land use history).**

1. Prior pesticide applications, if applicable.
2. Soil testing to determine nutrient levels and pH (have you done this yet?).

- **Environmental factors**

1. Sun and shade exposure.
2. Annual and seasonal precipitation.
3. Cold-hardiness and heat-tolerance zones.
4. Seasonal wind patterns.
5. Locations and features of microclimates.

The second goal of this worksheet is to take an inventory of all the site characteristics on which you will begin to develop your farm plan.

Overall Site Assessment

Here is where you look at your inventory coupled with the other inventories, and then step back and ask yourself the overall site assessment questions.

Worksheet 7, page 3

Step 4. Overall site assessment.

- Does this site fit into the overall farm vision? Briefly describe why or why not.
- List the overall assets that make this site suitable.
 - 1.
 - 2.
 - 3.
 - 4.
- List the challenges that may limit the site.
 - 1.
 - 2.
 - 3.
 - 4.
- Are the challenges surmountable, or do the challenges outweigh the assets?
- What are the top three “must-have” land-based resources and information you need to move forward with your farm plans?
 - 1.
 - 2.
 - 3.

Worksheet 8.

Assessing Your Financial Resources

Step 1. Read the information in the sidebar.

Step 2. Develop a preliminary inventory of your farm finances, assets, and liabilities.

- **Land and infrastructure**

1. How much land is necessary to carry out your farm enterprise?

2. What are your specific infrastructure needs?

- **Capital**

1. What (and how much) available capital do you have to get started?

2. What are your specific startup costs?
 - Land purchase:
 - Infrastructure need:
 - Initial production and postharvest costs:

3. Apart from your own capital, how much more capital do you need?
What sources do you have to obtain it?

4. Do you have the means to maintain financial stability until the farm becomes profitable?

It will serve you well to walk into your whole farm planning process with your financial eyes wide open. This ensures the best opportunity to prepare for and find the financial resources you need to make your dream a reality.

The overarching goal of this worksheet is to help you begin doing your homework — researching startup costs, considering associated legal and family concerns, locating sources of funding, and getting a rough idea of what to expect in terms of incoming revenue and annual business operating expenses. All of this information will be useful for developing your larger holistic financial plan.

Worksheet 8, page 2

If this business is expected to support your family on its own, be sure to include an adequate salary that allows your family to take care of itself and takes the cost of health care into consideration.

Also, think ahead as to how much and how long you'll be tapping into your retirement fund to give yourself an idea of how much you'll need to save each month to meet this financial goal.

• Legal considerations

1. Are you familiar with liability and other insurance needed for your enterprise?
2. If you hire off-farm labor to help with the farm, what costs are involved with insurance and worker's compensation?
3. Are there any zoning restrictions and/or covenants that might prohibit certain land uses?
4. If you rent or lease land, does the owner place any restrictions on its use?

• Family

1. Will this farm business support your family on its own, or will one or more family members work an off-farm job?
2. Who will cover your health insurance and other health costs?
3. How will you save for retirement?

Worksheet 9.

Assessing Your Production and Stewardship Preferences

Step 1. Read the information in the sidebar.

Step 2. Reflect on the following list of products and then circle the specific ones that intrigue you as possibilities to explore further.

Horticultural products

- Vegetables
- Herbs
- Small fruits
- Tree fruits or nuts
- Table or wine grapes
- Forest/nursery plants
- Flowers
- Ornamental/landscaping plants
- Other:

Agronomic crops

- Grains
- Silage
- Hay
- Forage
- Other:

Livestock

- Meat
- Dairy
- Poultry
- Other:

Fisheries/aquaculture

List:

There are many products you might grow or raise, each with its own set of unique production variables and characteristics. While the list of products provided in step 2 is broad-based, it is a good starting point to help you begin to identify product possibilities to be researched more deeply.

As you continue your larger whole farm planning assessment, you will be able to narrow down what product(s) best fit your farm enterprise.

The products you harvest may be sold “as is” or may require further processing.

Worksheet 9, page 2

Regardless of what products you plan to grow or raise, a central question to consider is the type of production management system you will implement.

Broadly speaking, conventional systems tend to maximize efficiency through the use of many inputs, like machinery, chemical fertilizers or bulk feeds, and pesticides.

Alternative systems focus less on efficiency because they depend on a more intensive management approach that uses less fossil-fuel-based inputs.

Module V, Sustainable Farming Practices, explores these systems in greater detail.

Step 3. Using the products circled in the previous step, check the options that best describe your possible processing needs.

Minimal processing

- Washing for fresh market.
- Washing and packaging for fresh market.
- Washing, packaging, and freezing for sale.

Extensive processing

- Butchering and packaging through processor.
- Value-added product processing (e.g., canning).

Step 4. Reflect on the question below and provide a brief response.

What type of management production system best fits your whole farm planning vision? Define it in a few words.

Step 5. What additional production and processing information or resources do you need in order to explore the potential products and types of processing? (Look back at steps 2-4.) List them here:

- 1.

- 2.

- 3.

Worksheet 10.

Assessing Your Marketing Options and Preferences

Step 1. Read the information in the sidebar.

Step 2. Reflect on the following list of venues to market your product(s) and then circle the ones you would like to explore as possibilities. List the names of particular markets, if applicable.

Direct markets

- Farmers markets
- Community Supported Agriculture
- Roadside stands
- U-pick farms
- Internet and mail order
- Agritourism
- Other: _____

Wholesale markets

- Auctions
- Cooperatives
- Wholesalers
- Other: _____

Retailers (restaurants, grocery stores, food service buyers)

List: _____

Institutions (e.g., schools, hospitals, prisons)

List: _____

Each marketing venue has its own set of unique characteristics, with both pros and cons. Choosing appropriate market venues depends on many variables related to your products, personal resources, and preferences, as well as the actual marketplace and consumer demand.

The purpose of the first part of this worksheet is to help you identify the types of markets you'd like to learn more about.

It is also important to consider personal preferences and accessibility issues because they have a direct impact on whether or not a particular market venue is a good fit. The personal preferences exercise in step 3 should be completed by each person involved in marketing your farm product(s).

Worksheet 10, page 2

The exercise in step 4 will help you get a better sense of some of the considerations that can often be overlooked or underestimated when looking at market options.

Remember, the exercises in this worksheet are intended to provide a good starting point for assessing possible marketing ideas for your products. As you work through this curriculum, the module on marketing (Module II) will help you fully formulate and write a thorough marketing plan.

Step 3. Check the statements below that **best reflect** your personal preferences.

- I am a “people person.”
- I want to market my product myself.
- I want someone else to market my product for me.
- I prefer a 9 to 5, Monday to Friday schedule.
- I am willing to work weekends.
- I am not comfortable sacrificing my privacy.
- I want the farm to be a family venture.

Step 4. Read and respond to the following questions that address accessibility to markets and legal considerations.

- What is the distance from your farm to market? Be specific for each type of market outlet.
- What handling considerations are related to your product idea (processing, storage, transportation)?
- If you are considering on-farm marketing venues, how accessible is your farm? What about parking? Neighbors?

Step 5. What additional information and resources related to specific marketing venues do you need to move forward?

- 1.
- 2.
- 3.

Worksheet 11. Action Planning

Refer to your previous worksheets. List your next steps by developing and listing goals, actions, completion dates, and names of people responsible for the completion of the action items. You will refer to these action plans as you work through the rest of the modules.

Goal: _____

Action to achieve goal	Transfer date	Responsible person
Special notes:		

Goal: _____

Action to achieve goal	Transfer date	Responsible person
Special notes:		

Worksheet 11. page 2

Goal: _____

Action to achieve goal	Transfer date	Responsible person
Special notes:		

Goal: _____

Action to achieve goal	Transfer date	Responsible person
Special notes:		

Glossary

Agricultural enterprises – Economic activities including traditional cropping and raising livestock to generate income and employ labor.

Asset – Something of value that is owned, such as property, money, or goodwill.

Capital – One of the three factors of production (with land and labor); the net worth of a business or household; a fund or sum of money that one is willing to or already has actually invested.

Holistic – Based on knowledge of the nature, functions, and properties of the components, their interactions, and their relationship to the business as a whole.

Land stewardship – A deeply held inner conviction that motivates landowners and land managers to take good care of the land, not only for personal gain, but for future generations and for the benefit of society.

Market analysis – A regional and neighborhood study of economic, demographic, and other factors made to determine supply and demand, market trends, and other factors important to leasing and operating a specific business.

Proprietorship – Ownership of a business.

Retail – A set of business activities carried on to accomplish the exchange of goods and services for purposes of personal, family, or household use, whether performed in a store or by some form of non-store selling. A retailer is a merchant middleman who is engaged primarily in selling to ultimate consumers. One retailer may operate a number of establishments.

Sustainable competitive advantage – A long-term advantage that is not easily duplicated by your competitors.

Venture – Undertaking of a business enterprise.

Whole farm planning – A holistic approach to farm planning that is designed to help develop important farming goals and action plans by balancing quality-of-life needs, farm resources, production aims, profitability needs, and farmland stewardship objectives.

Whole farm planning inventory – An assessment of your personal and professional resources within the larger social, cultural, and geophysical context in which you will farm.

Wholesale – All transactions in which the purchaser is motivated by profit or a business reason to make a purchase, except for transactions that involve a small quantity of goods purchased from a retail establishment for business use, which is considered a retail purchase.

Resources

Resource Contacts

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Whole Farm Planning in Grayson County

Grayson LandCare Inc.
www.graysonlandcare.org
276-238-7073
Jerry Moles, Coordinator, jmoles@igc.org
Danny Boyer, President, dtdboyer@centurylink.net

Whole Property Planning in Catawba Valley

Catawba Landcare
www.catawbalandcare.org

Additional Resources

Holistic Whole Farm Planning: Healthy Land, Sustainable Future. Holistic Management International. www.holisticmanagement.org/index.php?option=com_content&view=article&id=553&Itemid=43

How to Establish Goals: A Group Project for Farmers and Their Families, by J. Lamb, 1998. The Minnesota Project and The Minnesota Institute for Sustainable Agriculture. www.mnproject.org/publications/wfpbook2.PDF

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