



Extension

Whole Farm Assessment

Defining Whole Farm Assessment

A **process** we use to assess the social, environmental and economic factors on your agricultural business.

- Do you have a clear goal to guide your management (future vision)?
- Are people on your farm on board with this goal?
- Do you have systems that can help you achieve this goal?
- Are you making money you want or need?
- Do you have environmental concerns or ecosystem health issues?
- Are your levels of production where you want or need them to be?



Points to cover...

Values

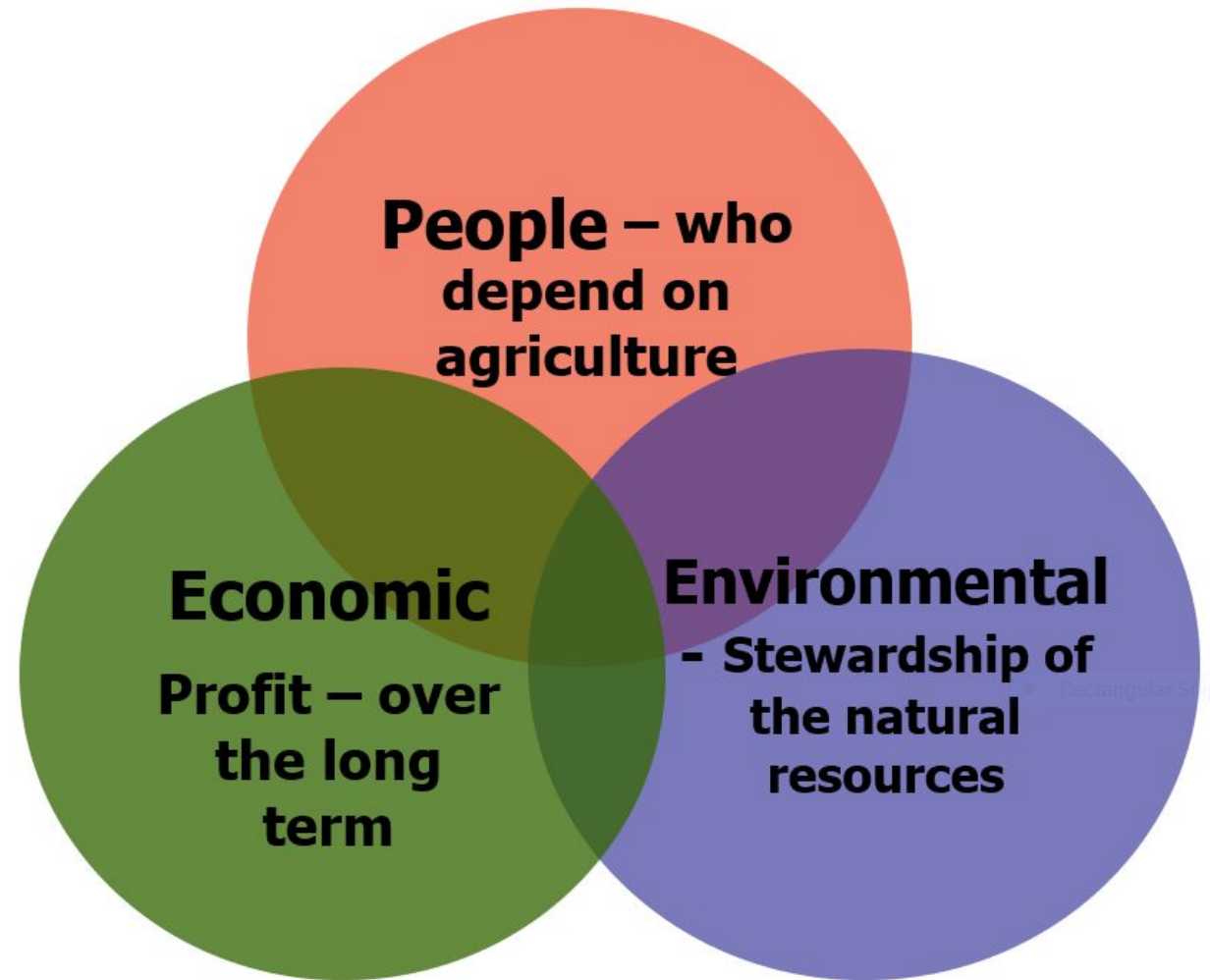
Systems

Ecosystem/environmental health and production

Economics/market analysis

Social aspects

Assessing issues/opportunities on the farm





Issues on the farm

- Conflict amongst employees/owner
- Ecosystem issues (erosion, soil compaction, disease pressures)
- Poor production practices
- Outdated varieties
- Inefficient facilities
- Customer service
- Product quality
- Record keeping shortfalls
- Business management needs



Get clear on values.

- Define what you are managing towards.
 - What do you value?

Values

Quality of Life/Values Examples

Our farm is a financially profitable business that allows us to create a fulfilling life, on and off the farm.

We value harmonious relationships with our family, workers and friends, and feel proud of what we contribute to the local community.

The land will continue to support farming for the next generation.

We enjoy learning new things and improving our farming skills.

We value having a sustainable level of debt that does not overwhelm us.

We value time to be with family and friends



Action Planning

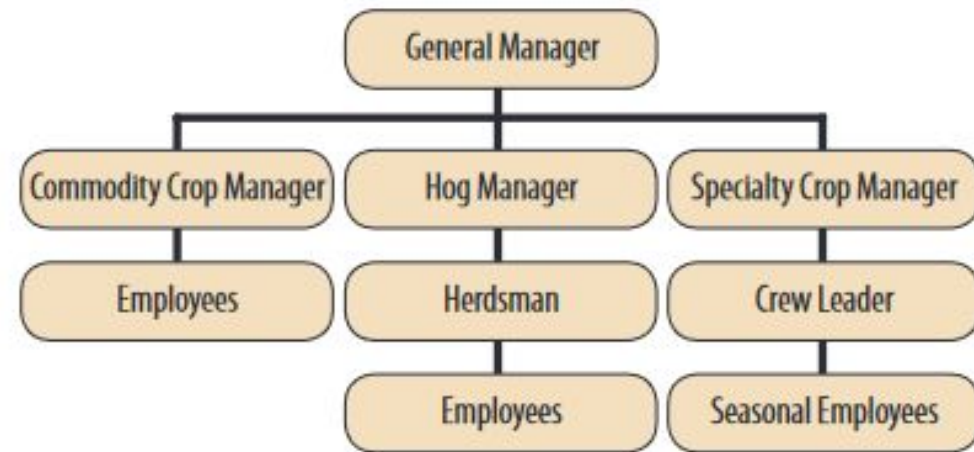
Here we create **behaviors and systems** to make all of this happen!

- These should be rooted in the values you have identified for your farm business and family life and should continually guide you towards your future vision.
- Examples...



Roles and Responsibilities – Are they clear and understood?

Figure 3. Enterprise or Product Organization Structure



Business/Economics

An illustration on a light blue background showing a document with a large "\$" symbol, a pie chart, a calculator, and a line graph with an upward arrow. The text "Profit and Loss (P&L) Statement" is written in bold, with "(profit and loss statement)" in smaller text below it. A definition follows: "A financial statement that outlines a company's revenue, costs, and expenses over a specified period of time." The Investopedia logo is at the bottom right.

Profit and Loss (P&L) Statement
(profit and loss statement)

A financial statement that outlines a company's revenue, costs, and expenses over a specified period of time.

Investopedia



Economic, Social, and Environmental Consideration Examples

Do you have a clear understanding of your revenues and expenses?

Do you know your net profit, understand balance sheets (own vs owe, loans), or maintain a cash flow budget?

How do you make the decision to scale up/down?

Have you evaluated your markets and products for profitability?

What's your quality of life like?

Are you able to take vacations?

How often do you see your kids?

What do you like to do off the farm?

Are your production systems aligned with your goals? (tunnels, high density, netting)

Are your production practices dialed in? (pruning, cultivation, irrigation management)

When is the last time you reviewed efficiencies on your farm?

Do you have standard operating procedures (SOPs) in place?

So What?

- What difference has it made on farms we've worked with?

