

HOLISTIC MANAGEMENT

OVERVIEW

Fife, Scotland, Feb. 2019

HOLISTIC MANAGEMENT

The Life You Want



HOLISTIC MANAGEMENT

- How to:

Care for your **PEOPLE**

Improve the **LAND**

Make a **PROFIT**

By making better decisions

Participant Activity

- What do you DREAM of doing in the next 5 to 10 years.
- Share this with a neighbour.
- Five minutes

Can our farms be Sustainable?

- If we don't look after
 - Our People?
 - Our Land?
 - Our Money?

- And a new Generation?

- If you grow the best grass but don't look after your finances will you be successful?
- If you grow the best grass and look after your finances but not your people will you be successful?
- We need to be taught and encouraged to look after the **WHOLE** of our operation. Not just the **PRODUCTION** side.

Share from our Experience

- Took our first course in 1995
- Established a Holistic Goal
 - Involved our daughters (age 13 & 11)
 - Tony & Fran back on same page
- Started using planning materials
 - Looked at the coming year – work load
 - Able to adjust the work load
- Started using planned grazing charts
 - Able to have someone else do pasture moves
 - While we were away on holidays.

A Family Holiday??



In The Summer????

August 1996 in BC



Replace Snow Blower?



Testing = Snow Scoop



Energy & Community



Financial Planning Developed New Enterprises

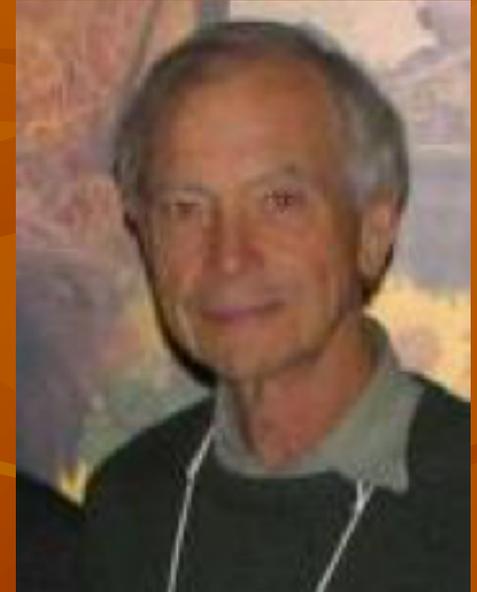
CSA Garden Pick Up



Freezer Meat Retailing



Allan Savory & HMI



10 Principles

- 1 – Nature Functions in Wholes
- 2 – Understand the Environment You Manage
 - Brittle and Non-Brittle Environments
- 3 – Livestock Can Improve Land Health
 - Mimicking wild herding with predators
- 4 – Time is More Important than Numbers

Brittleness Scale

- Brittle – very dry – desert most brittle
- Non-Brittle – moist – rain forest –
- Brittle and Non-Brittle Environments
 - Respond differently to same management
 - Rest – Non-Brittle – moves to more complex
 - Rest – Brittle - degrades
- Brittle Environments – Biological Community
 - In the rumen of grazing animals part of the year

Bare Capped Soil - Zimbabwe



6 months later – After - 200 cattle & 100 goats in a new area each day



Two Years Later



10 Principles Continued

- 5 – Define What You Are Managing
- 6 – State What You Want-Clear Holisticgoal
- 7 – Bare Ground is Public Enemy # 1
- 8 – Play With a Full Deck
- 9 – Test Your Decisions
- 10 – Monitor For Results

Quality of Life



Improve the Land



PROFIT



Conventional Decision Making

- Past experience, intuition, expert opinion, laws, regulations, friends advice, cash flow, research results, peer pressure, profit, cultural pressure, common sense, compromise, sustainability, etc.

MULTIPLE GOALS AND OBJECTIVES

Holistic Decision Making

All of the proceeding plus:

A HOLISTIC GOAL

and

SEVEN TESTING QUESTIONS



Holistic Management® Framework

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Statement of Purpose

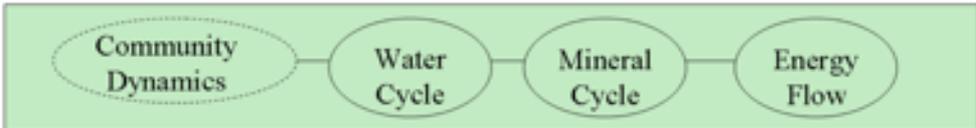
Whole Under Management

Decision Makers Resource Base Money

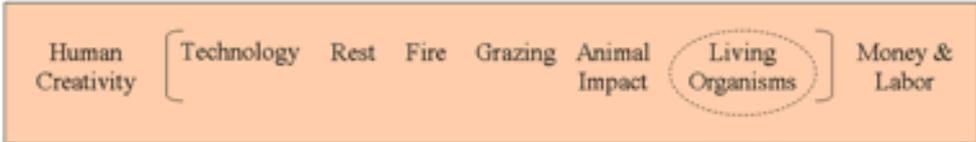
Holisticgoal

Quality of Life Forms of Production Future Resource Base

Ecosystem Processes



Tools for Managing Ecosystem Processes



Testing Questions

Cause & Effect Weak Link •Social •Biological •Financial Marginal Reaction Gross Profit Analysis Energy/Money Source & Use Sustainability Society & Culture

Management Guidelines

Learning & Practice Organization & Leadership Marketing Time Stock Density & Herd Effect Cropping Burning Population Management

Planning Procedures

Financial Planning Land Planning Grazing Planning

Feedback Loop



Our Experience at MPOF

- Holistic Goal – got us back on the same page
- Had a large and powerful tool box
 - Helped us manage specific aspects of our Farm Operation
 - Grazing
 - Financial planning

DESIRED RESULT

- Better Decisions that are:

SOCIALLY

ENVIRONMENTALLY and

FINANCIALLY SOUND

- That take us toward our Holistic Goal

Socially

- Involve All the Decision Makers
 - Family, workers
- Work Together to Develop a Holisticgoal
 - define QUALITY OF LIFE desired
- Share the work toward that Holisticgoal
- Communicate effectively
- Review and Revise the Holisticgoal

Environmentally

- **ECOSYSTEM BUILDING BLOCKS**

1. **WATER CYCLE**

2. **MINERAL CYCLE**

3. **ENERGY FLOW**

4. **SUCCESSION**

ECOSYSTEM

These four processes are
principles or natural laws.

It is impossible for us
to break the law
we can only break
ourselves
against the law

Understanding the Ecosystem

Lets us work with it

- Working with it increases
 - Productivity of our sunlight
 - Reduces stress on our animals
- Working with it decreases
 - Need for off farm inputs
 - Workload and stress on farmers

Moving Cattle from South A & B to Middle A – September 3, 2008



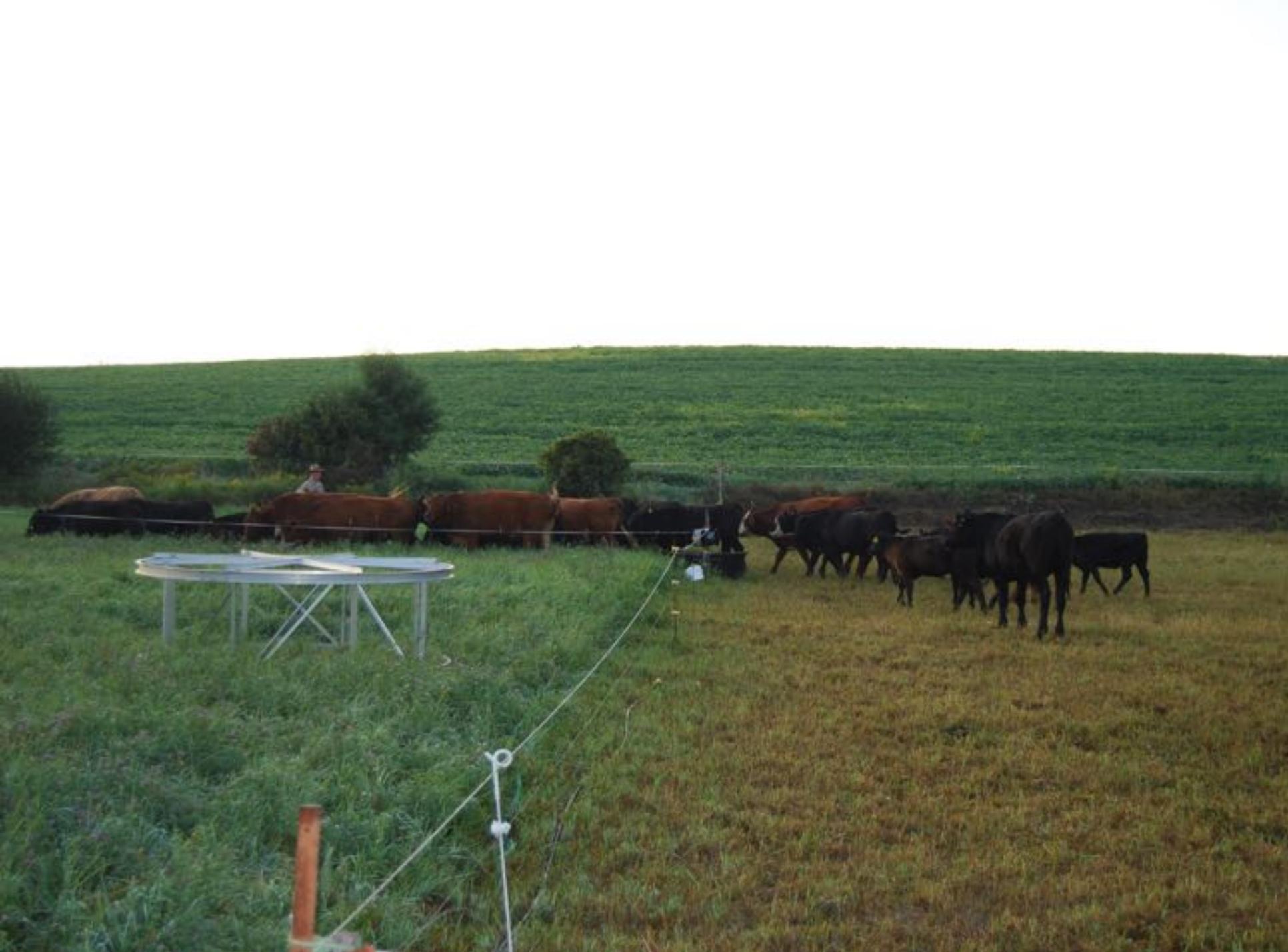
Opening the Gate into Middle A, Sept. 3, 2008



Cattle Flow into next strip – Middle A, Sept. 3, 2008









Elapsed time – around a minute – moving into
Middle A – Sept. 3, 2008





September 3, 2008 – Regrowth from Hay
cut June 24, 2008 – 64 day recovery –
Middle A

FINANCIAL PLANNING

Instead of doing something
and hoping it works out,

we are going to

plan the results we want in advance

then **monitor, control and re-plan**

to achieve our results.

STEPS TO FINANCIAL PLANNING

SUCCESS

1. Starting net worth

2. Plan income

3. Set profit

4. Allocate Wealth Generating Expenses

5. Plan & sort expenses

6. Do cash flow

7. Ending net worth

8. Plan, monitor, control



Financial Planning

- Paying yourself FIRST – planning a PROFIT
- Working in the future
- Spending wisely – Weak Link Analysis
- Sorting Expenses – Wealth Generating,
 - Inescapable and Maintenance
- Planning
 - Monitoring
 - Controlling
 - Re-planning

Identifying the Weak Link

Resource
Conversion

If you lack the ability to convert sunlight into raw resources and/or lack sufficient raw resources, then you have a **resource conversion** weak link.

Product
Conversion

Or, you may have more than enough raw resources, but you lack the capacity to convert them to a marketable form. In that case, you have a **product conversion** weak link.

Marketing
(Money
Conversion)

If you've created a great product or service, but are having difficulty selling it, then **marketing (money conversion)** is your weak link.

TESTING GUIDELINES

1. Cause and Effect
2. Weak Link, social, biological, financial
3. Marginal reaction
4. Gross Profit Analysis
5. Energy / Money Use and Source
6. Sustainability
7. Society and culture

TESTING GUIDELINES

1. Ensure that what we do is socially, environmentally and financially sound
2. Testing only has value when it is done against a 3 part goal
3. Must know if the environment is brittle or non brittle
4. Use testing when financial planning and when making a decision
5. Each test only requires a minute or two
6. An aid to making consistently better decisions
That move you toward your Holistic Goal

Why Have a Holisticgoal?

- A goal pulls us toward it
 - Problems push us around
- A Holisticgoal can serve as the guiding North Star to help us make decisions that are consistent and move us in a coherent direction.
- A Holisticgoal gives us a unified and shared vision against which to test decisions and objectives for their contribution to our long range dreams.
 - Holisticgoal vs “goals and objectives”
 - Test decisions and plans against the Holisticgoal

Our farms can be Sustainable!

- When we look after
 - Our People
 - Our Land
 - Our Money

- AND bring in the next generation!

How Holistic Management helped us with Succession

- It had helped put the farm on sounder financial footing.
- We had experience planning together.
- We had experience sharing our values and goals.
- We understood the importance of involving everyone in the process.
- We agreed on the “GOAL” before trying to design an agreement.

Things to DO!

- Talk with your partner/spouse
- Talk with your children
- If children aren't interested – explore with other possible successors

- Develop a clear goal or guidelines
- Figure out and have a clear understanding of who is involved in the process.

What are the Challenges?

- Determining if there is a successor?
 - Designing a transfer that neither -
 - Burdens them with unaffordable land prices
 - Or
 - Tempts them to sell after a few years.
-
- If you want the successor to be successful and the farm to carry on today's land prices are a challenge.

Will there be a Successor?

- Do your children feel that they and you are working/slaving/sacrificing for the farm?
- Or
- Do they feel that the farm is working for all of you and your shared goal as a family??
- Holistic Management made a big change for us as a family.
- After taking the course in 1995 started to experience that we could “manage” the farm to achieve our “Quality of Life”!

Start Young Or Start NOW!

- Joel Salutin – “Family Friendly Farming”
- Start developing management and decision making skills in your children or other prospective successors.
- Start giving them areas that they manage and control so they can build confidence and learn to manage.
- Not easy taking over something that the previous generation has had 30 to 40 years to develop and learn the ropes.

Start Early –Don't wait till 65!

- You need to start talking with children and other possible successors early on – well before you are expecting to be ready to retire.
- Develop a farm procedures manual that describes both HOW you do things and WHY you do things.
- Possibly make short instructional videos of various procedures – useful for the successor and any other help on the farm.

Don't Despair – Keep Offering

- Don't expect successors to come forward immediately – it is a huge commitment and it will foreclose other options that may seem very attractive.
- Encourage children to get experience on other farms and other occupations.
- If they don't immediately jump at the offer – it isn't a rejection of your life's work – but they need to be committed and enthused about taking it on and making it theirs.

With **HOLISTIC MANAGEMENT**

- We can:

Care for our PEOPLE

Improve the LAND

Make a PROFIT

By making better decisions

The End

■ The beginning

- More information - (sign up sheet)
- In Practice (magazine)
- Books
- Courses
- On line Courses
- Grazing Charts
- PERSONAL PRACTICE
- Web resources - <https://holisticmanagement.org>

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